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ABSTRACT

Based on the results of a June 1984 survey of 30 Association of Research Library (ARL) member libraries, this kit contains documents related to automation training programs for ARL library staff members. A summary of survey results indicates that few libraries performed formal needs assessments before embarking on programs related to automation training; 14 libraries are planning or have already implemented plans to provide basic training in automation; and only one library in which a specific automated system has been installed requires training for all staff members. The survey form is provided, and the following documents are included: (1) policies and program plans from the University of California at San Diego, Emory University, Massachusetts Institute of Technology, the University of Missouri, and Stanford University; (2) needs assessments from the University of Missouri and Massachusetts Institute of Technology; (3) staff development program announcements and descriptions from New York University, the University of Tennessee, Emory University, and Massachusetts Institute of Technology; and (4) staff training and trainers' manuals from New York University, Princeton University, Stanford University, the University of Texas, and the Massachusetts Institute of Technology. An eight-item bibliography and an ARI Systems and Procedures Exchange Center (SPEC) kit evaluation form are also provided. (KM)

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Staff Training for Automation in ARL Libraries

Kit 109

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spec flyer #109, NOV.-DEC. 1984 OMS
Systems and Procedures Exchange Center

ISSN 1060 3574

STAFF TRAINING FOR AUTOMATION IN ARL LIBRARIES

Automation in research libraries has been progressing over several decades, but in recent years its impact has spread to practically all staff positions due to systems already implemented or planning for new systems. With this increase in the use of automation comes the need to train and retrain large numbers of staff members -- both on a general level to understand and feel comfortable with their newly-automated environment, and on a more specific level to learn detailed procedures.

Thirty Association of Research Libraries members were selected to participate in a June 1984 written inquiry leading to this kit and flyer. Some results are included in the accompanying kit. The participants represented various sized libraries, as well as varying funding sources. Earlier, the ACRL Personnel Administrators and Staff Development Officers Discussion Group had suggested such a survey after members concluded that while some libraries were duplicating each other's efforts and could benefit from knowing what other libraries were doing in this area, others were doing little, either because they were not sure how to proceed or had not yet reached a point of identifying this area as a learning need for their staffs.

NEEDS ASSESSMENT. Needs assessment is generally recognized as a basic tool of staff development programs. Few libraries report having undertaken formal needs assessment surveys before embarking on programs related to automation training. One library identified this need in a general needs assessment survey, but did not specify further. One library is relying on informal needs assessment for planning purposes, and one other included questions on the staff's current level of knowledge in a more general purpose automation survey.

BASIC TRAINING. Basic level training in automation can include terminology; explanations of hardware and software and how they interact; introductory material on telecommunications; differences between a microcomputer, a minicomputer and a mainframe; the MARC record and its role in automation; and so forth. Staff members without professional training, as well as librarians who attended library school before the advent of courses in automation, need to be involved in planning for systems. They need to have some understanding of terminology to be able to communicate with each other, with systems staffs, with vendors and other librarians, and to read and understand current library literature. There is also a need to address an underlying level of computer anxiety felt by many staff members.

Fourteen libraries of the 30 surveyed have recognized a need for this basic level of training and are planning or have already implemented plans to provide it. Several of them are relying on university programs, while a few have made efforts to provide basic level or computer literacy programs within the library. Eight responding libraries have sponsored staff development events and several have conducted a series of meetings and workshops related to automation. These events cover such topics as office automation, computer basics, library applications in automation, and library applications for microcomputers. Two libraries indicate that they have brought staff from other libraries to describe operating automated systems and the impact of implementing automation on the organization and the staff.

The Systems and Procedures Exchange Center (SPEC) is operated by the Association of Research Libraries, Office of Management Studies, 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036. Telephone (202) 232-8656.

SPECIFIC TRAINING. Once a specific automated system is installed, training is no longer optional. Staff who need to operate the system must be trained, and training is limited to only these staff members in about half of the responding libraries. Only one library requires training for all staff members. Limited training modules for staff members not directly involved with an automated system are conducted by six responding libraries and in preparation by a seventh.

The personal computer has had some impact on plans for automation training. An earlier SPEC survey revealed that 50 of 74 responding libraries were offering staff some training on the use of microcomputers. In the present survey as well, most respondents mention training related to micros and word processing systems.

RESPONSIBILITY AND SUPPORT FOR TRAINING. No clear focus for the assignment of responsibility for training has emerged from this limited inquiry. Libraries that have developed programs for basic level automation training tend to be those that have assigned this responsibility to either staff development committees or to ad hoc task forces. Responsibility for training in the use of specific automated systems is more clearly focused. Systems staffs, project managers and functional supervisors normally are responsible and rely heavily on vendor supplied training. Frequently, a few staff are trained by the vendor and these people then are responsible for training other staff either on the job or through in-house workshops. Training manuals or manuals for trainers have been developed by several libraries for use with specific systems.

In all libraries that provide support for outside automation training, eligibility for support, the level of support, and released time for courses are handled as part of the overall support for job-related training, staff development, and continuing education, and are covered by existing policies. Fourteen responding libraries indicate that staff may elect to pursue these on their own, while seven libraries require some training for specific staff members.

ISSUES AND NEEDS. Automation in libraries will increase as systems are implemented affecting all aspects of operations: technical services, public services and administration. While the belief seems widely held that there is a need to provide a basic level of computer literacy, few institutions have undertaken a program of needs assessment to establish level of knowledge before planning development programs. Training for automated systems is often limited to those directly involved in the use of the systems, and except for task-related training, no pattern of responsibility has emerged for staff development programs in the area of automation.

While many libraries have undertaken programs to establish basic understanding of automation issues, efforts should be made to fully integrate these programs into the library's staff development program. A planning process, including needs assessment, should precede implementation, and the programs reviewed on a regular basis so they will meet the changing needs of the library and its staff.

The Kit on Staff Training for Automation (#109, November-December 1984, 116 pages) contains survey results, five policies and program plans, two examples of needs assessment, four staff development program descriptions, six examples of staff training materials, and a list of selected readings.

SPEC Kits are available mainly by subscription from: SPEC Center, Office of Management Studies, ARL, 1527 New Hampshire Ave., N.W., Washington, D.C. 20036. Individual kits are available for $20.00 prepaid, effective January 1, 1985. Outside the U.S. and Canada, add $5.00 per order to the prepayment for parcel post shipping. (ARL library members receive kits for $10.00).

This Flyer/Kit was prepared as part of the
Collaborative Research/Writing Program
by Tom Wilding, Assistant Director for
Administration, Massachusetts Institute
of Technology Libraries.

USES OF SPEC KITS

The Systems and Procedures Exchange Center (SPEC) is a clearinghouse operated by the Association of Research Libraries, Office of Management Studies that provides a central source of timely information and materials on the management and operations of large academic and research libraries. It facilitates the exchange of knowledge and documents through SPEC Kits, which are distributed ten times each year to ARL members and other interested libraries. The Kits include topically-arranged groupings of unedited primary source documents – selected for their value to administrators and decision-makers – that illustrate a wide range of alternative approaches to specfic issues.

Kit documents come from general membership surveys and from selected libraries contacted directly by SPEC, and most Kits are produced within six months of surveys. The documents' value comes from their variety of ideas, methods, and solutions. They are not viewed as finished products, but rather as points of departure for a library's planning efforts and as stimulants to innovative approaches to problem-solving. As such, Kits do not present answers or prescriptions for any one library; instead they illustrate how selected ARL members are planning for or dealing with particular issues. The worth of any one Kit to a particular library will depend upon the specific topic covered and the library's stage of development in that area.

Materials are selected according to the following criteria:

- Presents an approach of potential value to administrators and decision-makers
- Timely, and dealing directly with the topic under consideration
- Probability of application of ideas or thinking to other library situations
- Illustrative of actual practice, rather than theoretical
- Understandable, readable communication

All together, the materials should provide a range of alternative approaches that complement each other, provide variety, and stimulate comparison and contrast.

Libraries can take advantage of the Kit compilations in a number of ways. Administrators can evaluate the assumptions, methods, and results of other libraries' approaches; compare and contrast them; and use the learnings in their own situations. Library staff members can use the kits as professional development and current awareness tools. Committees and task forces can use them to begin a review of current practices. And the Kits can identify other persons or places to contact for further information. Back-up files in the SPEC office also are available for loan to member libraries. In addition, SPEC will conduct on-demand surveys or analyses geared specifically for a single library.

EVALUATION

Kit Title/Number _____

1. Which uses did the library make of this Kit?

2. Please indicate how useful the Kit was for these purposes.

☐ Very Useful ☐ Quite Useful ☐ Somewhat Useful ☐ Not Useful

3. Do you have suggestions for this Kit or for future Kits?

(optional)

NAME _____

LIBRARY _____

PHONE _____

Please return this form to the SPEC Center, OMS/ARL, 1527 New Hampshire Ave., N.W., Washington, DC 20036.

1/82

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ISSN 1060 3582

STAFF TRAINING FOR AUTOMATION
#109, NOVEMBER-DECEMBER 1984

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June 11, 1984

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

SPEC SURVEY: STAFF TRAINING FOR AUTOMATION

Please return completed survey by September 1, 1984 to "Staff Training Survey," Tom Wilding, Libraries, Massachusetts Institute of Technology, Cambridge, Mass. 02139.

Library_____

Respondent_____

Respondent Phone (a.c. _____)

BASIC TRAINING IN AUTOMATION

Are you providing or making plans to provide staff members with a general basic level of knowledge of library automation?

yes 14 (82%) no 3 (18%)

PLEASE PROVIDE COPIES OF PLANNING OR POLICY STATEMENTS OR DESCRIBE PLANS BELOW:

Documents in SPEC Kit. Also mentioned were university sponsored courses and workshops; library workshops; reading lists.

a. Who is responsible for implementing these plans?

More than one Response Possible

1 staff person (title Personnel Librarian)
5 staff development committee
____ parent institution
6 other (Please specify Systems Staff)
5 Ad hoc committee 4 Supervisors 2 Technical expert

b. Has needs assessment been carried out to identify specific kinds of knowledge required?

yes 2 (15%) no 15 (88%)

LIBRARY_____

PLEASE PROVIDE COPIES OF NEEDS ASSESSMENT INSTRUMENTS OR RESULTS OF SURVEYS OR DESCRIBE NEEDS ASSESSMENT PROCESS AND RESULTS BELOW:

_____
_____
_____
_____
_____
_____

c. Has your library conducted or sponsored staff development events as a part of this program?

yes 8 (47%) no 9 (53%)

PLEASE PROVIDE COPIES OF ANNOUNCEMENTS, CURRICULA, DESCRIPTIONS, OR TRAINER'S MANUALS FROM THESE EVENTS OR DESCRIBE BELOW:

_____
_____
_____
_____
_____

d. Does your library provide support for staff members who wish to take outside courses in library automation?

yes 16 (94%) no_____ 1 no response

PLEASE PROVIDE COPIES OF POLICY STATEMENTS PERTAINING TO THE KIND AND AMOUNT OF SUPPORT OR DESCRIBE POLICY BELOW:

_____
_____
_____
_____
_____
_____

e. What criteria are used in selecting staff members to participate in these programs?

More than one response possible

_____ required for all staff members
7 required for certain staff members
(Please specify_____
_____
14 participants are self selected
1 other
(Please specify) As recommended by supervisor_____
_____

PLEASE PROVIDE COPIES OF POLICY STATEMENTS RELATED TO SELECTION CRITERIA

LIBRARY_____

TRAINING FOR SPECIFIC SYSTEMS

II. Has your library provided or made plans to provide training for staff members in specific automated systems (e.g. circulation, serials control, online data base searching)? Please specify applications and indicate whether training was carried out by the vendor of the system, an outside consultant, in-house workshops, on-the-job training or a combination of these .

Systems: On-line catalog(4); circulation(6); acquisitions(4); word processing(3); catalog maintenance(3); on-line data base searching(7); serials control(3); microcompuers(2); OCLC(2); ILL(1).

Sources: Vendors(10); staff person(1); library schools(2); on-the-job training(8); in-house workshops(7); outside programs(1); orientation program(1); local network(1).

a. Who has been responsible for planning and arranging training?

More than one response possible

- 2 staff person (specify title Personnel Librarian)
- 1 staff development committee
- 9 project manager or system supervisor
- 3 other (specify systems staff)
- 5 supervisor 1 Associate Directors 1 Basic Training Program

b. What criteria are used to select staff members for participation in this training?

More than one response possible

- 1 required for all staff members
- 8 required for staff members using system but open to other interested staff members
- 8 required for and limited to staff members using system
- ____ other (Please specify_____
- 2 No response)

PLEASE FURNISH POLICY STATEMENTS OR OTHER DOCUMENTS WHICH DESCRIBE CRITERIA FOR SELECTION FOR THIS TRAINING

c. Have limited training packages been developed for some staff members?

yes 5 no 9 1 in preparation 2 no response

PLEASE FURNISH ANNOUNCEMENTS, DESCRIPTIONS, CURRICULA, OR TRAINING MANUALS FOR THESE PACKAGES OR DESCRIBE BELOW:

_____

_____

_____

_____

_____

_____

Return by September 1, 1984 to: Tom Wilding, Libraries, Massachusetts Institute of Technology, Cambridge, Mass. 02139.

University of California at San Diego

SAN DIEGO: THE UNIVERSITY LIBRARY
LA JOLLA, CALIFORNIA

November 17, 1983

Statement of Responsibilities Regarding Training of Library Staff in the Use of Automated Systems

Training of Library staff in the use of automated systems will be an on-going process that may involve participation by all staff members. It will consist of a continuing cycle which has these phases:

1. Identification of needs.
2. Preparation of training programs to address the identified needs (including enlisting people with relevant technical and training expertise).
3. Presentation of programs, with participation by appropriate staff members.
4. Evaluation of program's effectiveness in providing the training needed.

The responsibility for carrying out the steps identified above will be assumed by these groups: The Personnel Office will have responsibility for surveying library departments to determine training needs, and to act as a clearinghouse to which individual staff members or departments may forward their suggestions/requests for training. Library Personnel Office also will have responsibility for logistical arrangements associated with training programs, that is, scheduling events, announcements to staff, facilities, equipment, supplies, and the like. Additionally, LPO will be responsible for evaluating the effectiveness of the programs presented.

The Systems Department will have lead responsibility for assessing the training needs identified by departments and by individual staff members. Systems also will be responsible for the technical content of training programs presented. Systems may also recognize training needs and initiate requests thru LPO.

Staff members from throughout the Library may be called upon to contribute their expertise as planners or presenters of training programs on automated systems. As a matter of procedure, plans for enlisting a staff member's participation in the preparations for training programs will be discussed first with his/her department head.

Jackie Coolman

Jacqueline Coolman
Personnel Librarian 11

WORD PROCESSING TRAINING PROPOSAL 1984/85
GENERAL LIBRARIES, EMORY UNIVERSITY

INITIAL PROGRAM & APPOINTMENT OF WORD PROCESSING COORDINATORS

During the first part of 1983 the General Libraries received its first IBM Personal Computer. Prior to that time a Digital VT100, a Radio Shack TRS 80 had been purchased for use in the Administrative offices and an Apple for use in Candler Library. Since that time most of the General Libraries Department Heads and secretaries have received basic training covering use of IBM Personal Computers and the software package "Wordstar." A trainer/consultant was employed in March of 1983 to provide the initial training for twelve General Libraries employees who handled most of the secretarial work outside the Administrative Offices. The training was conducted through a combination of eight 1 1/2 hour classroom lectures/demonstrations and weekly hour-long individual hands-on practice sessions. Two participants were provided with slightly advanced training and designated as "coordinators" to assist each participant with their practice sessions. In addition, the trainer held a word processing overview session with department heads/division directors.

In the fall of 1983 one of the two word processing coordinators transferred to a non-secretarial position within the library. The other coordinator continued to assist users by scheduling use of the IBM Personal Computer in Technical Services and problem solving as she was able. During the winter and spring of 1984, sixteen department heads and directors received four hours of basic "Wordstar" training on an individual basis. The lone coordinator provided this training, and it was well received. She was employed to provide this training in addition to her regular 40 hour per week schedule and was paid on an overtime basis. She, too, has now transferred to another position within the library.

PRESENT STATUS, TRAINING PROPOSAL AND RATIONALE

Additional IBM Personal Computers have been purchased in recent months and in one department (Special Collections) the half time Assistant has trained all permanent staff in the department to use their IBM PC. In Candler Library, in additional to the two librarians, two technicians are using the software package "PFS" for inventory control.

New staff have been employed in recent months who need training, and at present, there is no one officially in charge of Personal Computer scheduling, ordering supplies, problem solving or training. On a temporary basis, Linda Nodine recently provided training to two newly employed secretaries. Anite Westlake left schedules through October when she changed jobs. Because of her proximity to the PC in Technical Services, Mary Ann O'Donoghue is sought out for word processing problem solving. She spends on an average of one hour per week resolving word processing problems, and if she runs into a problem she can't resolve quickly, she goes to Mary McAbee, who is quite knowledgeable about word processing. Anita Westlake still spends approximately one hour per week training students as requested on an ad hoc basis and problem solving; and Mary McAbee still orders supplies and does some problem solving which takes about one hour of her time per week. This adds up to three hours per week.

We are not yet at the point of having sufficient numbers of personnel trained in each department to be able to expect them to train new staff as needed. In addition, librarians and unit supervisors are interested in receiving rudimantary training in the use of these computers. Although employees can learn to use an IBM personal computer without an instructor, it does not appear to be cost effective for the library because it takes much more time. It is obvious that we are still in a dynamic situation. Perhaps in one or two years we will no longer need to provide "start-up" training on these computers. However, in order to provide the needed support to train appropriate personnel during--at least--the next year, the following proposal has been developed and is presented for your consideration.

It is proposed to employ a word processing coordinator to work approximately 260 hours (6 hours per week) on a temporary basis during the next 10 months. This person would provide basic IBM Personal Computer training (using primarily the software package "Wordstar") for selected library staff, and would coordinate PC use scheduling, supplies ordering, help users with problems, and assist with the development of library word processing policies and procedures. In addition this employee would help assess basic software packages which could be of use to the Library.

It is proposed to provide 4-6 hours of individual IBM Personal Computer training during 1984/85 for approximately 25 library employees who could benefit from learning word processing, (e.g., secretaries, librarians and unit supervisors). At the proposed rate of $7.50 per hour this comes to $30 - $45 per person training costs.

It is further proposed to provide funding to send the word processor coordinator to courses taught by IBM to receive their training on various software packages and to study their training methods. In addition the trainer would be scheduled to attend the free University computer training courses.

It appears to be to the Library's advantage to employ an existing half time employee on a temporary basis for this work. Several half time employees who could and who might be interested in this work have been identified. If [redacted]s interested in working approximately 5 to 6 additional hours per week, she seems to be the best candidate since she has already been training employees on an ad hoc basis. Therefore, if the premise of employing someone on a temporary basis during 1984/85 is accepted, it is proposed that [redacted] and [redacted] discuss the proposal with [redacted] since [redacted] works in her department and it would mean the juggling of [redacted] hours in the department at times. If [redacted] is amenable, the position would be offered to [redacted] for the year at a rate of $7.50 per hour with an addition of approximately 6 hours per week (260 hours through 8/31/85) to her regular 20 hour per week schedule. She would continue to receive her the rate of [redacted] for her permanent job.

If [redacted] is not interested in this position several others library employees have been identified who we could contact, and if no existing employee is interested, we could employ someone outside the library on a casual pay basis. The cost for this program would be as follows:

258 hours (6 hours per week, 11/4/84-8/31/85) @ $7.50/hr.	$ 1,935
Fringe benefits at 17.5%	339
IBM Training Programs, 5 programs @ $99	495
(Introduction to IBM PC [includes Visacalc, PSS & Basic Programing]; LOTIS I, II and III; DOS 2.1; Displaywriter; and Multiplan)	
	$2,769

Janet Paulk, Peggy Kline, Johnnie Givens 10/18/84(30)

Massachusetts Institute of Technology

RECEIVED
JUN 06 1983
OFFICE OF
DIRECTOR OF LIBRARIES

TO: Tom Wilding

FROM: Staff Development Committee

RE: Possible topics for future programs on automation in the Libraries

DATE: June 29, 1983

Attached is a list prepared by the Staff Development Committee of suggestions relating to a series of presentations on various aspects of automation in the Libraries.

We have arranged these programs in chronological order; we felt some topics were more pressing than others in terms of what is occuring in the library system and would be beneficial to staff members in answering questions, or alleviating any anxiety about automation. Library committees which may be interested in sponsoring (or co-sponsoring with the SDC)a particular program are indicated after each topic.

The Staff Development Committee would appreciate your bringing this list to the attention of the Steering Committee for any comments or suggestions they may have as to other topics, the timing of presentations, and how to best achieve the participation of other committees. Our next meeting is July 14, and if possible, we would like to have any feedback by then so we can continue our planning process.

Staff Development Committee suggestions on topics for future programs on automation in the M.I.T. Libraries.

1983

Extend an invitation to a staff member from a university library who has the GEAC system to discuss such aspects as implementation of the system, user attitudes, staff experiences. This would also include a question-answer period. (Circulation Committee, or various task forces of the Circulation System Implementation, SDC)

A presentation by Sherry Turkle, Associate Professor, Science, Technology, and Society program, M.I.T..Ms. Turkle's area of interest is the psychological aspects of automation, and would discuss computer anxiety. (SDC)

A presentation by Irene Grieff, Laboratory for Computer Science, M.I.T.. Ms. Grieff would present an overview of the impact of automation on work load and employee attitudes. (SDC)

A demonstration/presentation by the vendor of the microcomputers to be installed in various locations of the Libraries. Aspects to be covered include the use of microcomputers in libraries, training of staff, and other applications of microcomputers (e.g., statistics). (Microcomputer Task Force, SDC)

A discussion by Mary Pensyl and Lisa Corneliesse on the similarities and differences between bibliographic searching and online quick reference. Discussion of recent developments in online literature searching. (RISC)

A demonstration by Patrick Purcell, Associate Professor of Architecture, M.I.T. on the LEXIS and NEXIS systems, as well as other communications technologies currently under development. (RISC)

1984

A presentation by Dick Marcus, Research Scientist, Laboratory for Information and Decision Systems, M.I.T. on the CONIT Project, which is an experiment to standardize the languages of commercially available databases. A hands-on demonstration will be included. (RISC, SDC)

A presentation on automated serials check-in. (JCTP)

A presentation on online catalogs: goals of the system, future directions. This is a far-ranging topic with many aspects which could be discussed. (JCTP)

M E M O R A N D U M

June 12, 1984

To: Tom Wilding

From: The Staff Development Committee of the Libraries

Subject: Annual Report, 1983 - 1984

Membership: Beth Easter, Roberta Fagin, Louise Goodman, Barbara Lieberman, Michael Leininger and Susan Durante.

Chairperson: Susan Durante

Accomplishments of the past year:

GEAC at NYU - Nancy Kranich's presentation about the GEAC system and its implementation at NYU

General Introduction to the World of Computers, two-part presentation by Wes Burner of IPS - two-part program

Computers at Work -- The Computer System: Machines and People - video/film shown twice during IAP

Establishment of permanent telephone network to disseminate information to library staff about upcoming SDC activities as an adjunct to written communications for use during the present Committee's term

Needs Assessment - continuation of this long-term project

Travel Policy Recommendation - reviewed current policy and created proposed guidelines for travel reimbursement within the libraries

Open Meeting - New Member Reception - discussion on staff development in the MIT Libraries

Future Goals of SDC

Needs Assessment - conduct formal needs assessment survey - provide staff with results and provide Steering Committee with interpretation thereof.

Automation and the importance of automation on jobs - program related to this topic - perhaps panel discussion

Future Goals - continued

Oral Presentation - program or workshop on how to give a report as recommended by the Library Staff Association

Longevity Program for employees - possible future project - also recommended to the Committee

Library Orientation Program - re-review of program because of new technology's affect on the libraries

OMS film series - possible utilize availability of management films

New Chairperson for 1984-1985 is Roberta Fagin

Program Objectives

1. To raise the level of knowledge of computers for all library staff, regardless of rank, status, or position by:
   a. increasing their understanding of computer terminology and acronyms.
   b. increasing their appreciation of type of computing equipment or hardware.
   c. introducing them to the role of computer software and how programs are created.
   d. introducing them to selected types of programming languages.

2. To increase the confidence and competency of staff in using computers by:
   a. providing opportunities to inspect, handle, and use various types of computing software.
   b. providing opportunities to actually use computers for several library-related functions including cataloging, verification, interlibrary loan, bibliographic retrieval, information (data) retrieval, report writing, statistical and financial analysis, text editing scheduling, message sending (electronic mail), accounting, personnel and payroll data, borrowers files analysis, etc.

3. To explore how new computer applications might be made in the Libraries to improve staff efficiency and effectiveness, to restructure or redesign jobs, and to improve library management decisions. (It is anticipated that this discussion will extend for about four weeks after the conclusion of the 16 week program.)

V. PROGRAMS

A. Introductory Program

1. "Introduction to the Computer Competency Program," by the UMC Director of Libraries. The entire staff is invited to this program where the rationale for the overall program will be discussed along with the goals of the program. There will also be an explanation of the various activities of the program.

2. "Computer Awareness," by the UMC Office of Human Resource Development. A computer awareness program will be presented which will address such areas as history, terminology, technology, integration, and future opportunities. [redacted]

3. "Introduction to the Use of Computers in Library and Information Science" by the UMC School of Library and Information Science. This short course is a basic introduction to the use and application of computers for the design and control of library processes. Basic terminology will be explained.

4. "The Use of Microcomputers in Libraries: a Basic Introduction," by the UMC School of Library and Information Science. This program will cover: library applications in general, components, jargon, database management, word processing, spread sheets, finance packaging, computer assisted instruction, and vendor demonstrations.

5. "The UMC Academic Computing Center: Computing and Communication Systems," by the UMC Academic Computing Center. This program will address the computing needs of Columbia campus users, including an overview of computing facilities, services, publications, and accounting procedures. Emphasis will be placed on how the center interacts with the UMC Libraries.

B. Intermediate Programs

All intermediate programs will emphasize "hands-on" experience with computer equipment.

1. "Introduction to OCLC," by the UMC Library Search/Cataloging Department. This program will be a basic introduction to the capabilities of the OCLC system and its use in the UMC Libraries in cataloging, interlibrary loans, in acquisitions, and as reference tools.

2. "Introduction and Use of LUMIN," by the University of Missouri Office of Library Systems. This program will be an overview of LUMIN, the Libraries of the University of Missouri Information Network. The current status of the development of the online catalog and its capabilities and special features will be discussed.

3. "Introduction and Use of LITQUEST," by the LITQUEST Coordinator. LITQUEST is the name of the computerized information retrieval service that has been available at the UMC Libraries since 1978. Since then search analysts have conducted over two thousand computerized literature searches. Access is available to over two hundred databases. This program will include a basic introduction to this method of information retrieval and the subject coverage available.

4. "Introduction and Use of the UMC Libraries Automated Circulation System," by the UMC Library Circulation Department. Two PDP

11/03 minicomputers record circulation transactions generated by bar-coded borrower cards and keypunched book cards. Application programs are run daily to update the circulation files. This program will introduce the current system and include a discussion of the future plans to upgrade and further develop the system.

5. "The UMC Libraries' IBM Displaywriter," by IBM representatives. This program will cover how the UMC Libraries currently uses the IBM Displaywriter. Explanation of available software will include: LogiCalc, Textpack 6, Reportpack, UCSD P-System Development, Bisynchronous Communications System, and 3270 Package. Various other software packages will be explained with an indication of possible future use.

6. "Introduction and Use of BATAB," by the UMC Library Acquisition Department. This program will be an introduction to the use and interpretation of BATAB, the automated acquisitions system.

7. "The UMC Campus use of the IBM 5520 Word Processor." by the academic Computing Center. The University's innovative use of this word processor has drawn national attention, and inquiries from 70 different schools for demonstrations. This program will explain how the IBM 5520 is used with the University's computer network. The innovative use of the system to electronically transfer information to other sources such as other University of Missouri campuses, departments within the university, University Printing Services, and newspapers will be explained. A demonstration of the system will be given.

C. Advanced Programs

1. "Computer Applications in the Health Sciences Library," by Health Sciences Library Personnel. This program will cover various computer uses in the Health Sciences Library, and will emphasize explanation of various health science databases, such as MEDLINE. Demonstrations for the various databases will be given.

2. "OCLC Searching Techniques," by UMC Library Search Cataloging Department. This program will consist of "hands on" experience in small groups in searching the OCLC System. Both public and technical services personnel use this database. Various strategies and searching tips will be covered in addition to the basic commands.

3. "LUMIN Searching," by UMC Library Catalog Maintenance Department. This program will feature small group sessions of "hand on" training in the use of the online catalog. UMC Library personnel will have to become familiar with the system before it becomes available for public use.

4. "Future Enhancements and Developments to LUMIN: the Four Campus Online System," by the University of Missouri Office of Library Systems. This program will cover the planned future enhancements to the online catalog. Also discussed will be possible system developments concerning acquisitions, circulation, inter-library loan, and serials control.

5. "LITQUEST Searching," by UMC Library search analysts. This program will provide the opportunity for small groups to become involved in the process of a search, from the formulation of the search strategy to its execution online.

6. "OCLC's New Model 300 Terminal, IBM Personal Computer," by an OCLC representative. This program will describe the use of the new OCLC Model 300 terminal, which is an OCLC enhanced and customized IBM Personal Computer. Powerful new local options will be explained, along with possible future software developments that may be made available to libraries.

7. "UMC Libraries' IBM Displaywriter: A Self Tutorial Program." This program is an individual "hands on" tutorial program, in which staff members can interact with the word processors, in order to learn the basics of the system. The program will feature examples which the UMC Libraries are currently using.

8. "Using Personal Computers." Discussion, tutorial, and hands-on experience in using personal computers and various software packages. Apple and IBM equipment will be used.

VI. EVALUATION

Evaluation of the program will be accomplished through the use of two tests on the terminology of library computer technology. Before the program begins, all staff members who wish to participate in the program will be given a test covering the terminology that will be discussed or used in each program. At the end of the overall program, participants will take the same test. Comparison of the two tests will indicate to what extent the participants have increased this aspect of computer literacy.

At the end of each program, an evaluation questionnaire will be given to each participant. This will provide for responses to each of the three programs. At the end of the overall program the UMC Libraries Staff Development Committee will review all the specific evaluations to determine the effectiveness of the entire program.

Finally, the larger question of the long term impact of this program on library organization, employee effectiveness, and job design will be discussed in the weeks following the conclusion of the workshop. It is quite possible that the Library Planning Committee on Automation will incorporate some of the "learnings" generated by the program and incorporate them into planning recommendations. It is hoped that such long range results will also be captured to some extent in our evaluation, and particularly in any articles which may be written on this program by staff participants.

XI. PROGRAM TIMETABLE

	INTRODUCTORY	INTERMEDIATE	ADVANCED
Week 1	Intro to the Computer Competency Program Computer Awareness	Same	Same
Week 2	Intro to Computer Use in Library and Info Sci		
Week 3	Use of Micros in Libraries		
Week 4	The UMC Academic Computing Center		
Week 5		Intro and Use of OCLC Intro and Use of LUMIN	
Week 6		Intro and Use of LITQUEST Intro and Use of the Automated Circulation System	
Week 7		Using the Display-writer	
Week 8		Intro and Use of BATAB Intro and Use of the 5520 Word Processor	
Week 9			Computer Applications in the Health Sciences OCLC Searching Techniques
Week 10			LUMIN Searching Future Enhancements to LUMIN
Week 11			LITQUEST Searching

	INTRODUCTORY	INTERMEDIATE	ADVANCED
Week 12			The OCLC Model 300 Displaywriter Tutorial
Week 13--Week 15			Personal Computer Tutorial
Week 16	Recap and Evaluation	Same	Same

Stanford University Libraries
Stanford, CA 94305
September 12, 1984

"Staff Training Survey"
Tom Wilding
Libraries
Massachusetts Institute of Technology
Cambridge, Mass. 02139

Dear Mr. Wilding,

In responding to your SPEC SURVEY, regarding STAFF TRAINING FOR AUTOMATION, we have decided to use a word processor for synthesizing the answers supplied by three of our training personnel. Training for the use of computers and computer based systems is not currently focused in any one office of Stanford University Libraries. The current breakdown of training responsibilites is as follows:

Respondent	Department or Office	Title and Area of Responsibility
Margaret Yanagihara (415) 497-3155	Acquisitions	Acquisitions Training Coordinator
David Langenberg (415) 497-1811	Access Services Gen. Reference	Data Services Librarian (data base searching)
Richard Anderson (415) 497-9724	Systems Office	Library Systems Analyst (personal computers)

BASIC TRAINING IN AUTOMATION

Are you providing or making plans to provide staff members with a general basic level of knowledge of library automation?

yes __X__ no _____

PLEASE PROVIDE COPIES OF PLANNING OR POLICY STATEMENTS OR DESCRIBE PLANS BELOW:

Acquisitions: No written policy is available.

Data Services: One of the charges of the Data Services Committee (a subcommittee of the Public Services Group) is to "identify and prioritize staff training needs" related to commercially available databases.

Systems Office: See attached personal computer training plan

LIBRARY Stanford University Libraries

a. Who is responsible for implementing these plans?
__X__ staff persons

Data Services: Data Services Librarian

Systems Office: Library Systems Analyst

b. Has needs assessment been carried out to identify specific kinds of knowledge required?
yes _____ no __X__

c. Has your library conducted or sponsored staff development events as a part of this program?
yes _____ no __X__

d. Does your library provide support for staff members who wish to take outside courses in library automation?
yes __X__ no _____

PLEASE PROVIDE COPIES OF POLICY STATEMENTS PERTAINING TO THE KIND AND AMOUNT OF SUPPORT OR DESCRIBE POLICY BELOW:

STAP funds may be available for those wishing to take an outside course.

e. What criteria are used in selecting staff members to participate in these programs?
__X__ participants are self selected

LIBRARY Stanford University Libraries

b. What criteria are used to select staff members for participation in this training?

__X__ required for and limited to staff members using system

PLEASE FURNISH POLICY STATEMENTS OR OTHER DOCUMETNS WHICH DESCRIBE CRITERIA FOR SETION FOR THIS TRAINING

Acquisitions: There is no written policy statement describing the criteria for selection for this training. As stated earlier, all new acquisitions staff who need to use the RLIN acquisitions subsystem are candidates for this training.

Data Services: There is no formal policy on selection for this training. On many occasions, a staff member will elect to attend a training/refresher session; on some occasions a supervisor may urge a staff member to attend. Training requests are rarely denied by the Data Services Librarian.

Systems Office RLIN searching training is available for anyone who wants it. Personal computer training is given to those staff members whose work requires it.

c. Have limited training packages been developed for some staff members?
yes __X__ no _____

PLEASE FURNISH ANNOUNCEMENTS, DESCRIPTIONS, CURRICULA, OR TRAINING MANUALS FOR THESE PACKAGES OR DESCRIBE BELOW:

Acquisitions: Searching in RLIN II and Acquisitions in RLIN II are the basic tools used for training in the RLIN acquisitions subsystem. Copies of parts of the RLIN manuals, and documentation of policies and procedures pertinent to the individuals's duties are given to trainees for their own use. The Searching and Ordering Manual (which is an in-house document and now in the process of being revised) is also used as a training tool. I have enclosed a sample curriculum for training bibliographic searchers in the Search and Order Division of the Acquisitions Department. This general curriculum is modified to meed the needs of other staff using RLIN, e.g., receivers in the Processing/Receipts Division. This curriculum, too, is constantly revised as better training proceduresare conceived.

Data Services Each library unit has compiled its own trainig materials. Among my goals is the development of a system-wide training manual.

Systems Office See attached draft of IBM PC DOS training manual.

UNIVERSITY OF MISSOURI-COLUMBIA
LIBRARY

INTER-DEPARTMENT CORRESPONDENCE

November 14, 1983

TO: Library Staff

FROM: Automation Committee

SUBJECT: Survey of Automation Needs

To fulfill part of its charge, the Automation Committee needs your help in identifying functions, operations, or services which are candidates for automation. Please take a few minutes to think about this issue, then fill in this survey. Be creative. Your responses will be an important part of our report which will become the basis for UMC Libraries' future automation plans.

1. What functions, operations, or services are automated in your job? What would you suggest to improve or expand these activities?

2. Concerning the equipment you use for these automated activities, what are any problems associated with this equipment? What equipment are you aware of that would perform better?

3. This area might best be answered by using the attached schematic with its example (see Page 6).

   a. Are there automated services, functions, or operations that you have seen or heard about at other libraries that you believe we should automate here? (E.g. computer assisted instruction using Wilson indices; statistical reports)

   b. Which parts of your present job might be automated?

   c. For those activities listed in 3a and 3b above, if we were to automate them, what equipment and/or computer programs are you aware of that we can buy and use (i.e. turnkey systems, software packages, etc.)? Could we use existing equipment?

   d. For those activities listed in 3a and 3b above, is needed data now in machine-readable form? Do we have this data or would we need to buy it? What further information would need to be converted?

4. Please list other thoughts, opinions, wishes, etc. concerning automation of UMC Libraries: other areas than yours, libraries as a whole, philosophical points, etc.

5. Have you had a course or courses on automation, computers, programming, systems theory, systems analysis, or other related topics? Please list them here:

6. Do you use a computer outside your work (i.e., do you own and/or operate a personal computer or other computing machinery)?

7. Do you have further background in automation or computers (previous employment, clubs, reading, etc.)?

Results of SDC Needs Assessment --APRIL 1982 survey of Staff Development Committee (Survey not included in Kit)

SUMMARY OF FINDINGS

Soon after the Needs Assessment Questionnaires were distributed to each member of the M.I.T. Library staff, we on the Staff Development Committee discussed our expectations about the responses. There was a purpose for our speculation. At the time, we were making plans for a workshop on time management as well as for a film presentation on how to run meetings. We felt certain that these two topics would rate high among the needs identified by the library staff. But we also questioned whether a select committee could determine the developmental needs of the entire library staff. Might not the results of this survey surprise us?

Surprised we were! We had never anticipated the overwhelming consensus expressed in the completed questionnaires. Although it might be assumed, as one respondent put it, that "for some things there are widely different needs for professional than support staff," the final figures indicate that the development needs identified by the professional staff are very much the same as those identified by the support staff:

Support Staff (I Need)	Professional Staff (I Need)
1. Oral Presentation	1. Time Management
2. Time Management	2. Conducting Meetings
3. Introduction to Library Automation	3. Introduction to Online Data Bases
4. Report Writing	4. Oral Presentation
5. Introduction to Cataloguing	5. Report Writing
6. Decision-making	6. Motivational Technique
7. Management Skills	7. Introduction to Library Automation
8. Introduction to Online Data Bases	8. Management Skills
9. ABC's of Copyright	9. Counseling Employees
10. Supervisory Skills	10. Decision-making
11. Bibliographic Instruction	

Moreover, supervisors and supervisees agreed, with surprising accuracy, on each other's developmental needs. For complete figures, see Appendix D, p. 25; the following page contains summaries.

Out of a total of 233 Library staff members, 75 (32%) completed and returned the questionnaire. Of that number, 32 were Staff/Exempt, and 39, Support Staff. (Four respondents left this part of the questionnaire blank). Of the Staff/Exempt returns, 7 said they were non-supervisors and 25 said that they were supervisors. Of the Support Staff, 23 said they were non-supervisors and 16, supervisors. For complete figures, see Appendix B, p. 17.

It is important to note that automation ("Introduction to Online Data Bases" and "Introduction to Library Automation") figured so highly in the returns. The increased use of automation in the M.I.T. Libraries within the past few years, and the promise of automated circulation and acquisitions systems, of online reference service, electronic mail, and, eventually, an automated catalogue, has generated a great deal of enthusiasm and anxiety among the staff. Being able to deal with these changes effectively is obviously a high priority among staff members.

Supervisors
(I Need)

1. Time Management
2. Report Writing
3. Oral Presentation
4. Conducting Meetings
5. Management Skills
6. Introduction to Library Automation
7. Supervisory Skills
8. Motivational Techniques
9. Introduction to Online Data Bases
10. Counseling Employees
11. Delegating Responsibility
12. Decision-making

Supervisees
(Supervisor Needs)

1. Management Skills
2. Delegating Responsibility
3. Time Management
4. Supervisory Skills
5. Conducting Meetings
6. Decision-making
7. Motivational Techniques
8. Counseling Employees
9. How to Listen
10. Oral Presentation

Supervisors
(Supervisor Needs)

1. Delegating Responsibility
2. Conducting Meetings
3. Motivational Techniques
4. Management Skills
5. Supervisory Skills
6. Counseling Employees
7. Time Management
8. How to Listen
9. Decision-making
10. Oral Presentation

Supervisors
(Supervisees Need)

1. Time Management
2. Introduction to Library Automation
3. Delegating Responsibility
4. Oral Presentation
5. How to Find Materials in the M.I.T. Libraries
6. Introduction to Online Data Bases
7. Telephone Etiquette
8. Conducting Meetings
9. Taking Minutes for Meetings
10. Decision-making

Supervisees
(I Need)

1. Introduction to Online Data Bases
2. Time Management
3. Introduction to Library Automation
4. Oral Presentation
5. Decision-making
6. Introduction to Cataloguing
7. Conducting Meetings
8. How to Find Materials in the M.I.T. Libraries
9. The World of Publishing
10. Preservation
11. Report Writing

Another finding of this survey is the generally realistic understanding supervisors and supervisees have of each other. Several respondents expressed satisfaction with their supervisors in their written comments. Both supervisors and supervisees agree that supervisors need to learn more about management skills, motivational techniques, and time management; and that they need to learn how to conduct meetings and how to counsel employees. Similarly, both supervisors and supervisees agree that supervisees need to learn--in addition to automation--time management, oral presentation, decision-making, and, surprisingly, how to find materials in the M.I.T. Libraries.

Perhaps even this should not be so surprising. Several people commented (see Appendices C and F, pp. 18 and 35, for full set of comments) that they would like to learn more about the M.I.T. Libraries, the collections, and the staff. Responses to topics such as "Introduction to Cataloguing," "The World of Publishing," "The ABC's of Copyright," and "Preservation" indicate that M.I.T. Library staff members would like to know more about how the Libraries work and their place in it. Supervisors, too, often commented that their supervisees needed to learn more about the larger picture. As one respondent put it: "The system so often locks us into narrow roles so that we do our jobs and know little else. It's bad for morale, militates against a system-wide point of view, and is totally contrary to good public service." The library staff indicated that what they need are the skills to help them do their jobs more efficiently, and perhaps this broader knowledge they seek can be understood to be as much a skill as time management. Although RISC and JCTP have recently begun to address this issue (e.g., the technical reports workshop, meetings among staff members who perform similar functions in different libraries), it is obvious that more needs to be done.

Part II of the Needs Assessment Questionnaire asked the Library staff to rate candidly the performance of the Staff Development Committee at the end of their first year. The responses were overwhelmingly favorable, as the pie charts on the next two pages show.

Results of SDC Needs Assessment

APPENDIX D 1
Top Ten Needs from
Pages 4-7

Staff/Exempt and Support Combined

I Need		Supervisor Needs		Supervisees Need	
1. Time management	63%	1. Management skills	38%	1. Introduction to Library Automation	30%
2. Oral presentation	59%	2. Delegating responsibility	37%	2. Time management	28%
3. Introduction to Library Automation	54%	3. Conducting meetings	32%	3. How to Find Materials in M.I.T. Libraries	20%
Report writing	54%	Supervisory skills	32%	4. Introduction to Online Data Bases	18%
5. Introduction to Online Data Bases	52%	5. Time management	31%	Delegating responsibility	18%
Conducting meetings	52%	6. Motivational technique	30%	6. Oral presentation	17%
7. Management skills	48%	7. Counseling employees	27%	7. Conducting meetings	15%
8. Decision-making	46%	8. Decision-making	24%	Motivational technique	15%
9. Motivational technique	42%	9. How to listen	21%	9. Decision-making	14%
Supervisory skills	42%	10. Introduction to Library Automation	17%	Taking minutes for meetings	14%
				Bibliographic instruction	14%

Support

I Need		Supervisor Needs		Supervisees Need	
1. Oral presentation	62%	1. Management skills	36%	1. Introduction to Library Automation	13%
2. Time management	59%	Supervisory skills	36%	Bibliographic instruction	13%
Introduction to Library Automation	59%	3. Delegating responsibility	33%	3. Motivational technique	10%
4. Report writing	54%	4. Motivational technique	23%	How to Find Materials in M.I.T. Libraries	10%
5. Introduction to Cataloguing	51%	Decision-making	23%	5. Time management	8%
6. Decision-making	49%	6. Conducting meetings	21%	Counseling employees	8%
Management skills	49%	Counseling employees	21%	Introduction to cataloguing	8%
8. Introduction to Online Data Bases	48%	Time management	21%	Delegating responsibility	8%
9. ABC's of Copyright	46%	Oral presentation	21%	9. Conducting meetings	5%
Supervisory skills	46%	10. Introduction to Library Automation	18%	How to listen	5%
Bibliographic instruction	46%				

Staff/Exempt

I Need		Supervisor Needs		Supervisees Need	
1. Time management	69%	1. Conducting meetings	47%	1. Time management	53%
2. Conducting meetings	63%	2. Time management	44%	2. Introduction to Library Automation	50%
3. Introduction to Online Data Bases	56%	3. Delegating responsibility	41%	3. Oral presentation	34%
Oral presentation	56%	Management skills	41%	Introduction to Online Data Bases	34%
5. Report writing	53%	5. Motivational technique	38%	5. Delegating responsibility	31%
6. Motivational technique	50%	6. Counseling employees	34%	How to Find Materials in M.I.T. Libraries	31%
7. Introduction to Library automation	47%	7. How to listen	28%	7. Conducting meetings	28%
Management skills	47%	Supervisory skills	28%	Decision-making	28%
9. Counseling employees	44%	9. Decision-making	25%	Taking minutes for meetings	28%
Decision-making	44%	10. Introduction to Library Automation	16%	Preservation	28%

Supervisors

	I Need	
1.	Time management	68%
2.	Report writing	66%
	Oral presentation	66%
4.	Conducting meetings	61%
5.	Management skills	59%
6.	Introduction to Library Automation	56%
7.	Supervisory skills	49%
	Motivational technique	49%
9.	Introduction to Online Data Bases	46%
	Counseling employees	46%
	Delegating responsibility	46%
	Decision-making	46%

	Supervisor Needs	
1.	Delegating responsibility	39%
2.	Conducting meetings	37%
	Motivational technique	37%
	Management skills	37%
	Supervisory skills	37%
6.	Counseling employees	32%
	Time management	32%
8.	How to listen	24%
	Decision-making	24%
10.	Oral presentation	15%

	Supervisees Need	
1.	Time management	49%
	Introduction to Library Automation	49%
3.	Delegating responsibility	32%
4.	Oral presentation	29%
	How to Find Materials in M.I.T. Libraries	29%
6.	Introduction to Online Data Bases	27%
7.	Telephone etiquette	24%
	Conducting meetings	24%
	Taking minutes for meetings	24%
	Decision-making	24%

Non-Supervisors

	I Need	
1.	Introduction to Online Data Bases	60%
2.	Time management	57%
3.	Introduction to Library Automation	50%
	Oral presentation	50%
5.	Decision-making	47%
6.	Introduction to Cataloguing	40%
	Conducting meetings	40%
8.	How to Find Materials in M.I.T. Libraries	37%
	The World of Publishing	37%
	Preservation	37%
	Report writing	37%

	Supervisor Needs	
1.	Management skills	40%
2.	Delegating responsibility	33%
3.	Time management	30%
4.	Supervisory skills	27%
	Conducting meetings	27%
6.	Decision-making	23%
7.	Motivational technique	20%
	Counseling employees	20%
9.	How to listen	17%
	Oral presentation	17%

New York University

BOBCAT Information

June 14, 1983/1

BOBCAT STAFF INFORMATION BULLETIN

I've tried to incorporate information about the new catalog, some sample searches for you to try, and a few caveats about what you may find (or not find).

1. **Bobcat** now contains about 40,000 records; after our transformed OCLC records are received and loaded we will have about 1/2 million records.

2. Presently the ALL/LIB screen is missing. This means that when you search **Bobcat** you will get a result from the full union catalog. Until we change the information in the system's internal tables ALL/LIB will not function, and the screen will not appear. However, these two commands are included among the commands on the handout. We will try to implement ALL/LIB as quickly as possible.

3. Some records which should have been included in **Bobcat** are missing. This is due to the fact that the tapes they were on could not be processed. About 1,000-2,000 records are missing, but will be included as soon as we can get them from RLIN. The card catalog does include these titles.

4. Duplicate records are in some cases included in data base. This may cause some confusion, but they will be eliminated soon.

5. Filing order is computer order, i.e., strictly letter by letter. Thus, "Architecture, Baroque" files after "Architecture and Society" since A comes before B.

   Search for the author Green-Pedersen, Svend; when you get the record give the command "IND" and examine where this name occurs in the author index. This is another good example of computer filing.

6. Names with Mac, Mc, and M will be filed letter by letter so that they will be separated in the name index.

7. Articles in most languages are included in the index entries. In fact, the only words on the **Bobcat** stoplist are "A," "An," and "The". If you do a title search TIL/LE you will be able to see the effect of this. Let me know your reaction to this please. You can get around the effect of this by using the keyword index, if you desire.

8. The A-T (author-title) index is based on an OCLC-like search. The system looks at only the first 4 letters of the author's name and only the first 4 letters of the title. This means that when you use the A-T search you do not need to type more than 4 letters for either part.

   This 4/4 search may lead to a search result which includes material you don't want. Again, let me hear from you on this. As an example of this, do A-T search on Dennis Marsden, title Workless. Your search result will include a book by Edmund Burke, which has an editor with the surname Marshall and a uniform title "Works". Both Marsden and Marshall answer to the shortened author "Mars" and both Workless and Works answer to the shortened title "Work".

9. Call numbers have the + sign which indicates oversize material appearing at the end of the call number instead of at the beginning as in the card catalog. Look at TIL/Introduction to virtual

10. Information which appeared on catalog cards as part of the call number now shows up as a string punctuated by slashes, e.g., look at NUM/CAL/QA76.D27

11. Serial holdings, unlike those for other formats, are not labelled. However, the elements will always appear in the following order:

BStack BH301.M6J75 Currently received. Permanently retained. 1- 1980-
location call # informational notes holdings

12. Since there is no authority control yet, you will find headings under 2 different forms. Please try to keep this in mind when searching.

13. For fun & games, try searching in 2 different ways for the following names:

    Guido y Spano, Carlos
    Jean de Meun
    Guillaume de Lorris
    Lavin, Marilyn Aronberg

14. CIT(ation) lists are not arranged in alphabetical order either by author or title, or chronologically by date. Hopefully, this will change soon.

IMPORTANT: Unless you report problems which you or patrons have found we cannot correct them. Please try to replicate the problem before you report it, noting at each step exactly what you did and what the result was. Give this information to me, in writing, with your initials and the date.

BOBCAT

Information June 24, 1983/2

BOBCAT STAFF INFORMATION BULLETIN

This bulletin covers a variety of subjects from taking care of **Bobcat** to newly discovered system problems.

A. General care and feeding of **Bobcat**.

1) Automated Services staff turn off **Bobcat** terminals at night and turn them on in the morning. If the terminals are not already on when you get to the Catalog Information Desk, turn them on. The on-off knob is underneath the monitor (screen) on the right-hand side. Be sure that each terminal displays the Introductory Screen. If the terminal menu shows instead, press the Send key twice to reach the Introductory Screen.

2) "Patrol" occasionally past the terminals (if the desk is not busy) to see if all **Bobcat** users are doing well in their searching and actually finding what they need. If you can see from what is on the screen that someone needs help, offer your assistance. At the same time you can see if any of the terminals have obvious problems.

3) Please be sure there are gold **Bobcat** Bulletins next to each terminal.

B. Taking care of a sick **Bobcat**.

1) Try to determine if the problem is limited to one terminal or affects the whole system. You can do this by trying to replicate the problem on another terminal (if you are able to tell what it was). Also check the other terminals to see that they are operating. If a HUGO ("he" is the operating system) error appears in the upper left corner of the screen, copy it exactly and report it. It will look like this example:

"HUGO error 005113
VAL=02158 VAL'1=13048"

The numbers will vary of course. Also, if you can, copy down the search which produced the error.

2) If the data on the screen is not in focus, turn the terminal off and then on again. If this doesn't work, notify one of the people listed below.

3) Don't try to fix the problem yourself; don't change the terminal parameters.

4) Call one of the Automated Services staff in the order listed below:

Diane Aquila, Mike Cummings	x7819, x2489	8:30am- 5:30pm	M-F
Gail Persky	x2498	9:00am- 5:30pm	M-F
Steve Calandro, Joe Rizzo	x2048	10:00am-10:00pm	M-F,Sat
Koshy George, Pat Warrington	x3904, x3606	8:30am- 9:00pm	M-F,Sat

If no one on this list is available, leave a message on the Systems phone answering machine (x2489). However, it may be quite a while before someone can return your calls, so try again soon to find someone.

5) If the problem is system-wide and none of the terminals is operating, turn them off and place the appropriate signs on them. If only one terminal is affected turn it off and use the "1 terminal sick" sign.

6) Pray for a quick recovery.

7) Wait for a call to tell you that the system is well again. This will usually take 15-20 minutes but this is not a given so please do not tell patrons any specific time.

8) Cooperate with Automated Services staff - give them as specific information as you can and follow their instructions. Be patient - we're all "just getting to know" our new **Bobcat** too.

C. Contents of **Bobcat**.

1) The last tape that was loaded into **Bobcat** was 5/24/83.

2) More recent tapes will be added during the next weeks. This will necessitate rebuilding the indexes, but the build cannot be done all at once. Therefore some indexes will be more up-to-date than others. We will always build AUT, TIL, and SUB first and keywords indexes later since the latter (especially TILK) take a long time.

3) Not all records for books processed in 1981 are in RLIN. This was due to the poor condition of RLIN during much of that year. We did a fair amount of manual cataloging during 1981 and these items are not in **Bobcat**. (It's a rather selective data base, as you can see!)

D. Relationship of **Bobcat** to Geac Circulation system.

1) In case you were wondering, the Circulation system has not been down because **Bobcat** was installed. This is purely coincidental!

2) After we match records in **Bobcat** and the Circulation system and the two systems can "talk" to each other, **Bobcat** records will contain a status field with information such as "On Reserve," "In Bindery," "Due back on (date)." This will not happen for several months.

E. Keyword searching

Author, title, and subject keyword searching is available. Keyword is a handy approach if you don't know the full information. But beware! If you search, for example for Henry, Patrick you will also get Adams, Henry. Both forenames and surnames are indexed.

F. Dialup access

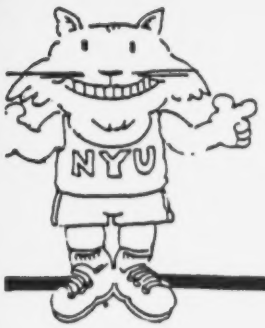
Many patrons have already asked about gaining dialup access to **Bobcat**. This will indeed happen but not for a number of months and certainly not until we complete the load of our OCLC archive tapes. It would be helpful in this context for you to mention how limited the data base currently is. People still must come here to consult the card catalog!

G. IND command

Have you all become accustomed to using the IND command to continue scanning through one of the indexes? For example, do the search AUT/SHAW, choose number 2, select#1 then go For (to see both entries attached to that index mode). Then give the command IND to return to the index. The entry you were just looking at, Shaw, Bernard, will now appear at the top of the list. Using IND is a handy alternative to the Previous Screen key.

H. Previous Screen

The Previous Screen key will allow you to view up to a maximum of 10 screens of data which you had seen already.



BOBCAT

Information Oct.17,1983/3

BOBCAT STAFF INFORMATION BULLETIN

Here is up-to-date information about **Bobcat.**

1. CONTENTS: Bobcat now contains 333,000 records (the public figure is 350,000).
   -OCLC Archive records for 282,000 monographs processed from 1973-1980. These were converted to the RLIN record format by Rutgers University and have been loaded into RLIN.
   -RLIN records for all formats of material (books, serials, etc.) processed since 1981. There are about 50,000 of these records.

OCLC Archive records for non-books materials have not yet been tested. Once this is done and they have been received by RLG we will get a copy to load into **Bobcat.**

Newly created RLIN records will soon be loaded on a regular basis, as we receive and copy RLIN tapes. The last tape loaded into **Bobcat** dated from 8/17/83. It takes from 1-2 weeks to receive a tape from RLG, have it copied and loaded it into **Bobcat.**

2. MISSING RECORDS: There are still records missing from Bobcat. Some OCLC records were skipped and several tapes of RLIN records were defective and could not be processed. Cataloging staff will have new copies of these records put on tape through RLIN; we will then add them to **Bobcat.**

** Please continue to report missing records since this has been extremely useful to us in "fixing up" **Bobcat.**

3. CALL NUMBER PROBLEMS: Unfortunately in the conversion of our OCLC archive records to the RLIN format, strange things happened to many call numbers. As a result certain call numbers in our records in both RLIN and **Bobcat** have the wrong call numbers. The card catalog, however, has the correct call numbers.

   Incorrect call numbers fall into 2 categories: Dewey numbers and National Library of Medicine (NLM) numbers:

   -Dewey call numbers start with numerals rather than with the usual letter(s) which characterize LC numbers. For example, 301.155E28 is a Dewey number now in **Bobcat.** There are many such Dewey numbers; they are not valid for any library except IMC.

   -NLM numbers look more like LC numbers since they begin with letters. You can recognize them by the space right after the letter(s) at the beginning of the call number; they may have other spaces as well, e.g., QZ 266 C14 1979. There are few of these NLM numbers (mostly in the science classifications).

There are 2 possible ways to deal with incorrect call numbers although only 1 of these ways is 100% sure:

1. Send the patron to check the card catalog - the information there is always correct; or

2. Call for the MAR (MARC) display (to be used by staff only). If there is a Field 050 in the record it will contain the LC call number. This call number is often, though not always, the call number that we used. Since you cannot be sure without checking the card catalog that this is the correct number, tell the patron to check the shelf, and if the book is not there, check the card catalog to see if a different call number was used. Please do not show the patron how to get the MAR(C) display.

   Look at the 2 examples of Dewey and NLM call numbers above (you can get to them by doing a CAL search). In each case there is an 050 in the MAR display with the correct call number (the card catalog was checked). The call number in the 050 is divided into 2 parts: subfield a contains the main part of the call number, while subfield b has the Cutter number. A complete call number consists of both subfields.

4. BROWSING THROUGH INDEX LISTS EASILY: You can browse through records in an index display which results from AUT, TIL or SUB searches. If you have chosen to look at one of the index entries, and now want to go on to see the very next index entry, type the command IND/2. Always use the number 2 since the entry you just looked at moves up in the index list to become number 1 and the next entry is therefore number 2.

   This marvelous method works only with AUT, TIL and SUB searches since you are looking at the actual index for authors, titles or subjects. This will not work for alphabetical lists you get in response to keyword searches since these lists are not true indexes but are simply temporary lists constructed by the system in response to your keyword search: thus to browse through a "constructed" keyword index, use the Previous Screen function key (or type PS) to get back to the alphabetical list. You can then choose the next item you want to see.

5. STOPLIST: A very short stoplist exists at present, as follows:
   For all search keys: a, an, and, the
   For keyword searches only: as, at, by, if, in, of, or, to, but, from, with
   There are no foreign words on the stoplist. However, if a foreign word is the same as one of the English words on the stoplist, it will be omitted in searches. For example, if you wanted to search the French title "A Rebours" you would have to omit the "A".

6. AUTHORITY CONTROL: There is none yet, so that many headings will have variant forms, e.g., "Asimov, I." or "Rochell, C." Since some of these variants are due to spelling errors, if you report them they will be corrected.
   Work is underway on authority control. Although we had hoped to have this completed by November 1, this date may slip.

7. ERROR REPORTS: To aid Cataloging staff in the clean-up effort please include on your error report forms the record ID number. When you look at the MARC display this is in the 001 field. An ID number that looks like "RLINNYUG82-B4551" should be reported as "82B4551". In other words, simply omit the "RLINNYUG".

BOBCAT

Information

September 1984/4

BOBCAT STAFF INFORMATION BULLETIN

Here's the latest information about Bobcat.

1. CONTENTS: The total number of records in Bobcat is now 351,584. The additional records were produced on RLIN up through March 3, 1984. We are now loading tapes regularly and will soon be current.

2. INDEXING: As we add new records to Bobcat index entries are being created for them in all indexes except the keyword indexes (AUTK, TILK, SUBK, and A-T.) We have to recreate the keyword indexes from scratch since a bug has been discovered in the way they were originally created. This means that you should use the AUT, TIL, SUB or NUM indexes which are more up-to-date than the keyword indexes.

3. CALL NUMBER PROBLEMS: These still exist but we have received a printout from RLG for records which are to be reconverted correctly. Once this is done they will be loaded into RLIN and sent to us for adding to Bobcat. IT IS ESSENTIAL THAT ALL STAFF WHO USE BOBCAT FOR THEIR OWN WORK OR TO HELP PATRONS BE AWARE OF INCORRECT CALL NUMBERS. For full information on the subject please refer to Bobcat Staff Bulletin 3. Please report incorrect call numbers as you encounter them; use the Bobcat error report forms.

4) DIACRITICS AND SPECIAL CHARACTERS: Only the accents used in French, Spanish and German are displayed on the public terminals. This means that some displays will simply lack special characters or letters with diacritics. The system does search for them, however, so be sure to include them when you type your search. For example, type TIL/Aegean and note how the title "Aegean archeology" displays. Bobcat terminals in Technical Services display all characters.

5) GREY ART RECORDS: They are still in Bobcat (hopefully to be removed soon.) However, the location Grey Art has been removed from the gold Bobcat Bulletin. If a patron asks about Grey Art materials please inform him or her that the collection is restricted.

6) DISABLED PATRONS' TERMINAL: A terminal, accessible to wheelchair patrons, is now located in Bobst on a table at one end of the row of terminals (north side of catalog room).

7) OTHER TERMINAL INSTALLATIONS: Terminals are now available on all floors in Bobst Library. Terminals have been installed in GBA and Cooper Union and will hopefully be available at the New School before the start of the fall semester. The main installation in Bobst has been remodelled to accommodate 30 terminals.

8) RESPONSE TIME IMPROVEMENTS: Geac staff have made certain changes to the programs used by Bobcat to improve response time. However, if you notice significant problems with response time please report them since additional improvements can be made.

9) AUTOMATIC HELP SCREEN: If a person using Bobcat does the same incorrect thing 3 times, the system will automatically show the person a help screen. It's like 3 strikes and you're out!

10) TOO MUCH OF A GOOD THING: In certain cases where 2 or more indexed fields in a record are exactly the same, they will cause the record to be listed twice in an index display. For example, do the following search: TIL/Microform review. You will see that the title occurs twice. Now look at the MAR(c) display; note that the fields 222 and 245 contain the same data. These fields are both indexed and are causing the same title to appear twice. Geac is working to correct this problem but it is not top on the priority list.

11) SEARCHING BY RLIN ID NUMBER: You can search by RLIN ID number as follows: NUM/CSN/[Rlin ID number]. For example, NUM/CSN/83-B941. This information is not available to library patrons since they would have no need for such a search.

12) SERIAL RECORDS: A great deal of work is going on in Cataloging these days to update our OCLC serial records. As you may recall, none of our OCLC serial records (approximately 1500 in all) are in Bobcat yet although they do appear in RLIN. The editing will do two things: add summary holdings to OCLC records so there will be some indication of what we have, and send a "fresh" copy of the record to tape for loading into Bobcat. You will begin to see more of our older serial records appear in Bobcat as the tape loads progress.

13) RLIN ACQUISITIONS RECORDS IN BOBCAT: Plans are underway to include acquisitions records in Bobcat. In the future when a book is ordered on RLIN a copy of the order record will be sent to tape, along with records for items cataloged, and then loaded into Bobcat. An acquisitions record will be updated when the book is received. These records will be marked as either: "on order" or "in process." Once the book is cataloged a complete cataloging record will be substituted for the acquisitions record.

14) BOBCAT-CIRCULATION DATABASE MATCHUP: Work has begun on this long project, with Geac staff having written several programs and NYU staff reviewing the results. Many records in both databases must be corrected in order to establish the link between individual records that is necessary to include an item's status in Bobcat. However, until a fairly large percentage of the matchup is completed no records in Bobcat will show status, lest partial information be more confusing or frustrating than none at all.

15) STAFF SUGGESTIONS: Your suggestions for improvements to Bobcat as well as for new information to be added to the News screen or the Bobcat Bulletin (staff or public) would be greatly appreciated. Send them to Gail Persky, 113 Bobst. Also please keep the error report forms coming; they're very helpful.

BOBCAT

Information

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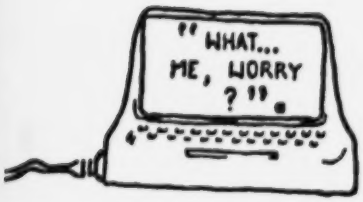
aut076

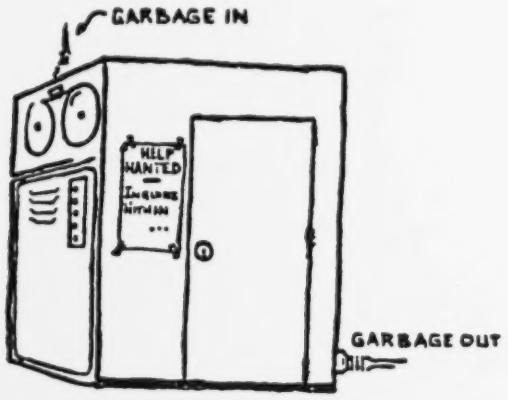
University of Tennessee

SCAN THIS: *2

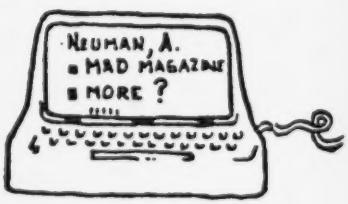
COMPUTER APPLICATIONS IN LIBRARIES
A BASIC OVERVIEW



The Staff Development Advisory Committee presents a lecture on the uses of computers in libraries. We will learn about different types of library operations which may benefit from computer assistance. Commercial systems will be discussed as well as some systems which have been developed within libraries. No specific system will be emphasized. The previous session on the "Basics of the Computer" is not a prerequisite for attendance at this session. Everyone is welcome.



The lecture will be presented by:
TAMARA MILLER
Library Systems Analyst



Two identical sessions will be offered:

	I	II
Date:	June 1, 1982	June 2, 1982
Time:	2:00-3:30 P.M.	3:00-4:30 P.M.
Place:	Rooms 102-103-104 UGL	Same

If you would like to attend, please detach the form below and send to:
Jill Keally, Main Library, Room 103 no later than May 24, 1982

Yes, I would like to attend the lecture on Computer Applications in Libraries.

Name:_____
Dept._____Ext._____

Dept. Head's Approval _____

Select one:

Session #1 June 1st, 2:00-3:30 P.M._____
Session #2 June 2nd, 3:00-4:30 P.M._____

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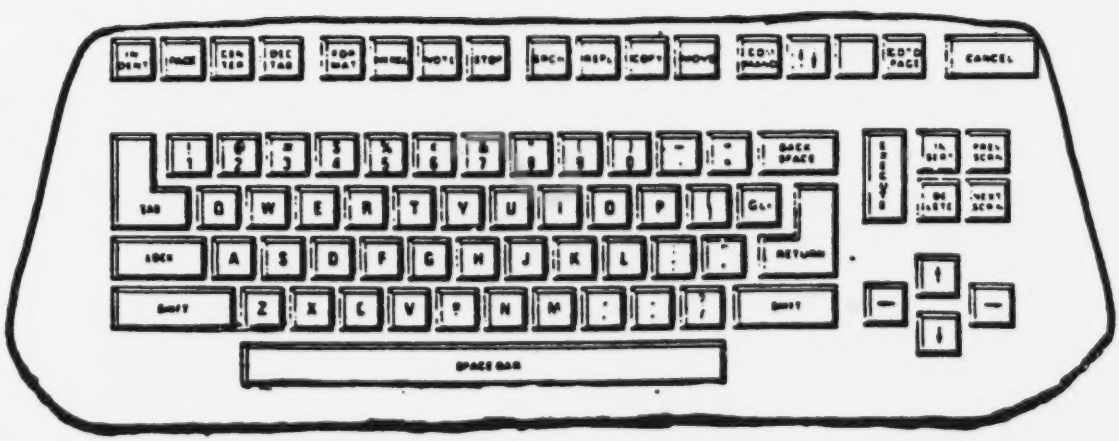
OFFICE AUTOMATION WORKSHOP

UGL Rm. 306

Monday	*March 19*	*1:30 - 4:00*
Tuesday	*March 20*	*9:00 - 11:30*
Wednesday	*March 21*	*9:00 - 11:30*

TOPICS: *Word Processing*
Electronic Mail
Calendar Management
Records Management



University of Tennessee

"IT'S GEAC!"

STAFF DEVELOPMENT PROGRAM

The Staff Development Advisory Committee is presenting a program which will feature the vendor chosen for the UTK Library on-line circulation system--- GEAC. This program will be an overview of the GEAC system. Appropriate departments will be given specific training in the actual operation of the system at a later date.

Tamara Miller, Library Systems Librarian, will provide the following information:

- Overview of GEAC.
- Machinery to be installed.
- Explanation of files which the system will contain.
- A look at procedures: comparing what we do now with what we will do in the future.

Ken Marks, Associate Director for Public Services, and Betty Bengtson, Associate Director for Technical Services, will be present to answer questions relating to policy.

If you are interested in attending, please fill out the form below and return it to Jill Keally, Personnel Librarian, Main Library by Thursday, October 14.

Yes, I would like to attend the GEAC program.

Name:_____

Dept.:_____ Ext.:_____

Department Head's Approval_____

Please select one of the three times the session will be offered:

_____ Monday, October 18, 9:00 - 10:30 am UGL 102
_____ Monday, October 18, 3:00 - 4:30 pm UGL 102
_____ Tuesday, October 19, 9:00 - 10:30 am UGL 306

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University of Tennessee

GEAC

JUST WHAT IS THIS NEW PRESENCE THAT IS PERMEATING THE AIR AND DOMINATING OUR DAYS AT THE LIBRARY? HOW DOES IT WORK AND WHAT ARE WE USING IT FOR?

To help enlighten you, the Staff Development Advisory Committee will present two prgrams on GEAC.

The first will consist of demonstrations by library staff members of the GEAC functions they use in their departments: Circulation, Reserve, Binding, and Cataloging. There will be two sessions limited to 40 persons each, so sign up today for one of the sessions if you want to see these applications of technological wizardry.

First Session:	November 10, 1983	3:15-5:15 p.m.
Second Session:	November 17, 1983	9:30-11:30 a.m.

Both sessions wil be held in UGL 306.

The second program will be an informal chance for staff members to have hands-on experience with GEAC. Individuals will be able to spend 15 minutes performing searches in the Public Query Function. Terminals in Cataloging and Serials will be available on November 21 from 1-5 p.m. and November 22 from 8 a.m.-noon. Experienced staff members will be on hand to show you the ropes.

You may choose one or both of these programs. Indicate your choice of sessions on the appropriate registration form(s) for each program you would like to attend, and return them to the Personnel Librarian's Office no later than November 7.

GEAC: Demonstrations in UGL 306

NAME_____ EXT._____

DEPT. HEAD APPROVAL_____

I would like to attend (check one)

November 10 at 3:15_____
November 17 at 9:30_____

GEAC: Hands on Experience in Technical Services

NAME_____ EXT._____

DEPT. HEAD APPROVAL_____

Indicate your 1st, 2nd, and 3rd choices

November 21		November 22	
	1:00_____		8:00_____
	1:30_____		8:30_____
	2:00_____		9:00_____
	2:30_____		9:30_____
	3:00_____		10:00_____
	3:30_____		10:30_____

PROPOSED AGENDA

DEMONSTRATION FOR THE GRADUATE SCHOOL OF LIBRARY AND INFORMATION SCIENCES

WEDNESDAY, NOVEMBER 30th, 1983

2:00-3:00 p.m.

ROOM 306 HODGES LIBRARY

INTRODUCTORY REMARKS - Donald Hunt (3 minutes)

- Welcome
- Formal opening September 29, 1983
- Timetable for integrated library system

HARDWARE AND SYSTEMS OPERATIONS - Tamara Miller (5 minutes)

- Current hardware configuration
- Current file sizes, etc.

DATA BASE - Betty Bengtson (15 minutes)

- OCLC
- Remarc and brief records, etc.

WHAT THE SYSTEM DOES

CIRCULATION - Sugg Carter (15 minutes)

- Charge/discharge
- Public query call number, author and title search
- Patron fine payment
- Hold/recall

RESERVE - Joe Rader (10 minutes)

- Creation of reserve lists and how used
- Unique loan periods, material types, etc.

CLOSING REMARKS AND OTHER QUESTIONS - Donald Hunt (5 minutes)

LIBRARY
THE UNIVERSITY OF TENNESSEE
KNOXVILLE 37916

MEMORANDUM

To: Library Department Heads

From: Betty Bengtson, Associate Director for Technical Services

Subject: GEAC Training Schedule and Trainees

The following schedule of training and selection of trainees has been approved:

January 17-21: COMPUTER OPERATOR TRAINING

This has already been held and included procedures for start up and shut down, overnight loading, backup, major re-start and restore, editing and updating of tables for circulation item generation and MARC loading. Tamara Miller, Meg McFaddin, Sugg Carter and Doug Freeman were trained by Chris Syed of the GEAC staff.

January 31-February 4: MARC DATA ENTRY TRAINING

Training in the use of the MARC Management System for maintenance of our machine readable cataloging records will be offered. Screen displays, addition of data to the files, editing procedures and interaction with other files are among the topics to be covered. Tamara Miller, Doug Freeman, Mary Jane Sharp, Steve Thomas, Evelyn Connor and Betty Bengtson will be trained by Pat Williams of GEAC.

February 28 - March 4: CIRCULATION DATA ENTRY TRAINING

Creating patron records, adding and changing records, adding new items (copies and volumes) and changing holding and barcodes are among the routines to be covered. Tamara Miller or Meg McFaddin, Paul Trentham, Roger Simmons, Sugg Carter, Joe Rader, Doug Freeman, Mary Jane Sharp and Norman Watkins will be trained.

March 7-11: CIRCULATION FUNCTIONS TRAINING

These sessions will include charging and discharging materials, reserve room, holds, messages and other functions for circulating materials. Tamara Miller or Meg McFaddin, Norman Watkins, Paul Trentham, Roger Simmons, Sugg Carter, Joe Rader plus two more people from circulation will be trained.

BGB/lf

Date February 1, 1983

The Robert W. Woodruff Library for Advanced Studies

EMORY UNIVERSITY
ATLANTA, GEORGIA 30322

Office of the Director

MEMORANDUM

TO: DEPARTMENT HEADS AND DIRECTORS

FROM: JANET T. PAULK

DATE: February 2, 1984

RE: Word Processing Training for Department Heads and Directors

Training a group of secretaries to use the IBM word processors last spring enabled all library departments to begin using our new IBM word processor without a long delay. Likewise it was proposed that the library provide department heads and directors with sufficient basic word processing training to enable them to use this equipment and make sound knowledgeable decisions concerning how its capabilities may best serve their needs.

In order that each of you may have "hands on" training with an instructor, arrangements have just been completed to provide you with four individual one hour word processing lessons this winter/spring. Each session will be held in Technical Services where the IBM computer and printer is set up (between Collection Management and Serials Control). Training sessions will be one hour per week (at the same time weekly) for four weeks and the first group of four can begin sometime next week. Practice time will also be made available.

Anita Westlake (OCLC Cataloging Dept.), word processing coordinator in Technical Services, will provide instructions for using WordStar and SpellStar word processing software packages on the IBM personal computer.

Enclosed is a layout of available time slots for each of the training periods (See Schedules A, B, C and D). For example, if you choose Schedule A, Thursdays, 3:00-4:00 pm, your lessons would be February 9, 16, 23 and March 1 at 3 pm (barring unforeseen library council meetings, etc.).

Please bring your calendar and see Anita Westlake today or Monday to sign up for a time during one of the four week periods which best suits your schedule. If you already know how to use WordStar and SpellStar on the IBM personal computer, please let her know that you do not need to take this course; otherwise, we hope you will take advantage of this opportunity to add to your skills, knowledge and capability to manage your department or division.

Enclosure

CC: Anita Westlake

GENERAL LIBRARIES - EMORY UNIVERSITY

Word Processing Training
Evaluation Form

1. In what way(s) was the training valuable to you? _____
   _____
   _____

2. How informative was the training?
   ____ Very informative
   ____ Informative
   ____ Somewhat informative
   ____ Not informative at all (please explain) _____

3. Would you recommend this training be repeated for other employees? _____
   If so, what level of employee? (List specific positions if applicable.) _____
   _____

4. Was the training:

____ Too long	____ Too short	____ About right
____ Too fast	____ Too slow	____ About right
____ Too elementary	____ Too advanced	____ About right

5. Did you like the format of the training? _____

6. Did you receive sufficient training?_____ If not, please indicate training you need. _____

7. Was the instructor clear? _____

8. Did the training seem well organized? _____

9. Were the questions you raised during the training answered to your satisfaction?
   _____

10. General comments about the instructor _____
    _____
    _____
    _____
    _____
    _____

11. What suggestions can you make for improving this training? _____
    _____
    _____

RETURN FORM TO:

Janet Paulk
Director's Office

NAME (Optional) _____

MIT

Massachusetts Institute of Technology

STAFF DEVELOPMENT COMMITTEE

Minutes of the Meeting January 4, 1983

Present: Durante, Easter, Fagin and Lieberman.

1. "The Computer System: Machines and People" will be presented twice during I.A.P. -- Thurs, Jan. 26 and Friday, Jan. 27 at 12 noon. Susan will take care of setting-up the library conference room and the beverages to be served. Beth will make-up flyer to remind everyone about the video film.

2. Travel policy recommendations -- Tom Wilding will attend our next meeting to further expand on this topic. A subgroup consisting Mike, Beth and Sue was formed to begin work on this.

3. Continuation of Needs Assessment: A subgroup was also set-up to formulate plans on continuing the needs assessment project. Roberta, Louise and Barbara will approach this.

4. Future Programs:
   Minutes Workshop -- the Committee will shoot for March/April as an appropriate time to conduct this workshop.

   Computer Program -- the end of April seems like a good time to have a program which will deal with computers and the stress and relating thereto.

Next Meeting: January 17, 1984 at 3 pm in Barker Conference Room
Agenda: Tom Wilding to visit
Review of Travel Policy
Needs Assessment -- report from subgroup
Update on future activities
IAP final details

sld

LIST A

Massachusetts Institute of Technology MIT

STAFF DEVELOPMENT COMMITTEE MEETING REPORT June 23, 1983

PRESENT: Sheelah Britt, Susan Durante, Beth Easter, Roberta Fagin (minutes), Steve Gass, Tom Kiely, Margo Miller

DISTRIBUTION: Committee members; List A

SUMMARY: The meeting focused on the committee's suggestions for future programs relative to automation in the Libraries and on continuing the needs assessment process.

1. Automation

The Committee is recommending a series of programs on different aspects of automation. A list will be presented to Tom Wilding appended with our sense of priorities, timing and suggestions regarding which ones might be appropriate for Staff Development Committee to sponsor. Beth will prepare the final statement and submit it to Tom.

Among the specific programs discussed today were:

'Perspectives on automating an office' - Steve spoke with Irene Grieff of the Lab for Computer Science about the possibility of a general presentation. Her response was positive.

GEAC - Steve spoke with Boston College who felt that they were not far enough along in their implementation process to be a strong resource for us at present. This topic will be postponed pending further discussion with Shirley Baker.

Microcomputers - we felt it would be useful to have a presentation on this topic in order to arouse interest and familiarize staff with the "lingo" as we will soon have microcomputers in a number of the libraries. Sheelah will speak with several people about this subject.

'Computer anxiety' - a presentation by Sherry Turkle, an Associate Professor from MIT's Laboratory for Computer Science, might be in order in the near future as we approach several different aspects of automation at once.

2. Continuation of the needs assessment process

We will use the summer to define our methodology and approach to continuing this in the future. At this particular meeting, we focused on the possibility of group interviews done by SD[illegible] 'teams'. We need to determine what kind of groups to approach (e.g. library staffs? committees? etc.). One suggestion as to format was to focus on a particular aspect of staff development for the first half of the meeting and take general comments for the latter part. to be continued...

Next meeting: July 14, 1983 2:30 Barker Conference Room

Agenda:

1. Continuation of needs assessment process
2. discussion of feedback from Tom Wilding on future automation programs -- and planning of some of these programs
3. discussion of Staff Development Program Outline (Tom Kiely will present his analysis and summary based on ideas discussed at our previous meeting)

MIT Library Notes 191/October 1983

VISITORS TO THE MIT LIBRARIES

Nawal Bialy, Director General of the Academy of Documentation for Scientific Research and Technology, in Cairo, visited the MIT Libraries on August 26. She was interested, particularly, in learning about computerized literature search services at MIT and the use of the OCLC interlibrary loan sub-system. The U.S. Agency for International Development is funding a project at the Academy to develop computerized systems for bibliographic access and information transfer. Edgar Davy, Dewey Librarian, was Mrs. Bialy's host at MIT for the visit.

John Pinfold, Assistant Librarian for Government Documents of the British Library of Political and Economic Science visited the Dewey Library September 2. The British Library is one of only two comprehensive depository libraries for U.S. Government documents in the United Kingdom. It has strong documents collections from the states of India, the United Nations and other international agencies. Edgar Davy and Bob Kehner, Documents/Processing Librarian hosted Mr. Pinfold's visit.

Other visitors during September were:

Ms. Matsuko Kyoto, USIS Library, Tokyo
Gerard George, USIS Library, Kuala Lumpur, Malaysia
Akio Miyamoto, Tokyo Institute of Technology
Ms. Kayoko Okubo, USIS Library, Sapporo, Japan
Paul Vassallo, Dean of Library Services, University of New Mexico
Donald Simpson, Director, Center for Research Libraries

VISIT FROM EXECUTIVE DIRECTOR

Shirley T. Echelman, Executive Director of the Association of Research Libraries, will talk to the library staff on Thursday, October 27 at 10:30 am in Room 9-150. Her topic is ARL's role in national library programs which include resource sharing, cooperative collection development, preservation, library education, copyright, and library legislation.

GEAC CIRCULATION SYSTEM USER WILL VISIT

The Staff Development Committee has invited Nancy Kranich, Assistant Director for Public and Administrative Services at New York University Libraries, to speak Friday, October 21. Ms. Kranich has been asked to review various aspects of NYU's experience in implementing the GEAC Circulation System. The presentation will be held in the Library Conference Room from 10 am to 12 noon.

Massachusetts Institute of Technology

LIST A & COMMITTEE MIT

STAFF DEVELOPMENT COMMITTEE MINUTES --- November 9, 1983

Present: Polly Baslock, Susan Durante, Roberta Fagin, Louise Goodman, Barbara Lieberman
Absent: Beth Easter, Michael Leininger

Summary: Review of travel policy
Planning for "General introduction to the world of computers"
IAP film update
Review of Nancy Kranich's presentation
Future committee programs

Review of Travel Policy

The Committee decided to table further discussion of the travel policy until we receive the travel specifications and further clarification from Tom Wilding.

Program Planning

The Committee is sponsoring: "General introduction to the world of computers: a two-part presentation," to be given by Weston J. Burner, Director of Information Processing Services. The program will consist of 2 one-hour presentations, each followed by a half-hour question-and-answer period. The program will be presented in the Library Conference Room on:

Monday, November 28th - 2:00-3:30 p.m.
Friday, December 2nd - 10:30-12:00 a.m.

IAP Report - Computers at work: video film series

The Committee hopes to present two different video films from the Bureau of National Affairs. They will cover basic computer information and literacy. This will occur on:

Thurs. & Fri., Jan. 26th & 27th, 12:00 in the Library Conference Room, 14-0615

The Committee is still waiting to review the films, pending their arrival from BNA.

Review of Nancy Kranich's presentation

The feedback on Nancy Kranich's presentation on "GEAC at NYU" was very positive, and the consensus was that it was both informative and well-received.

Future Programs

The Committee is considering the presentation of a program in late winter on the psychological impact of computers in the working environment.

Next Meeting

Monday, November 21
2:30 p.m. (note change of time)
Barker Conference ROOM
Agenda: H.W. Wilson Staff Development grant
Travel policy
IPS presentation - final preparations
IAP films
Future programs

STAFF DEVELOPMENT COMMITTEE

Minutes of the meeting December 7, 1983

Present: Durante, Easter, Fagin, Goodman, Leiberman, Leininger; Guest: Wilding

1. Review of the Wes Burner computer talks
   a. It is clear that the computer programs are drawing much larger attendance than anticipated and warrant scheduling in larger spaces.
   b. Burner's talk should be repeated and/or video-taped for the benefit of future employees, an IAP presentation or other staff development programs.

2. In a discussion with Wilding about SDC's recommendations on the Orientation Program, it was agreed that orientation should be reviewed periodically as the libraries are affected by the introduction of new technology.

3. Wilding suggested that the Committee might investigate changes in the requirements of the Libraries' staffs due to inevitable changes in the profession and how that will affect staff development. The Five-Year Plan may provide a framework for this investigation.

4. Discussed the possibility of bringing in a speaker on the use of micros in libraries.

5. Travel policy recommendations will commence after the committee has reviewed the ARL Spec Kit (which has not yet arrived).

Next meeting: Wednesday, December 21, 3:00 PM, Barker Conference Room

Agenda: IAP update; Holiday gathering

Massachusetts Institute of Technology

MIT

PLEASE POST OR CIRCULATE

Data Processing Fundamentals

The course provides a general introduction to computers and data processing. It consists of a basic overview of hardware, software, operating systems, language processors, information systems, data-base management, systems analysis, and programming. Participants need no knowledge of computers, but it is important that they complete reading assignments and homework problems. The information provided in the sessions is meant to supplement the assigned textbook.

The first session will be held on Wednesday, October 5, 1983 from 10 am to 12 noon in the Office of Sponsored Programs Conference Room, E19-758. The program meets each Wednesday morning until December 14, 1983 for a total of 10 sessions (there is no session on November 23, 1983). The course is designed for Managers and Administrative Officers and is being presented by Weston J. Burner, Director of Information Processing Services at M.I.T.

An application form is attached. Applications must be received in E19-242 by Wednesday, September 21, 1983.

Effective Presentation Techniques

The five-session workshop is designed for individuals who make presentations as part of their jobs. The course covers the mechanics of presenting, organizing a presentation, using visual aids, and handling questions. Specific techniques and exercises to improve presentation skills are practiced. Opportunities are provided for participants to make presentations. Homework is assigned to be completed between sessions.

The workshop is from 10 am to 12 noon on Fridays, October 7, 1983 to November 4, 1983 in the Personnel Development Conference Room, E19-438. It is being presented by Dr. Dennis Becker from The Speech Improvement Company. It is open to all personnel who make presentations as part of their jobs.

An application form is attached. Applications must be received in E19-242 by Friday, September 23, 1983.

When a book is presented for checkout and no barcode is found in the book, or the message "BARCODE ERROR, RETURN TO SYSTEMS" is displayed when the item is wanded, then the book has never been checked out through the computerized system.

EVERY EFFORT SHOULD BE MADE TO AVOID ADDING DUPLICATE BOOK RECORDS TO THE SYSEM DATABASE. The procedure below should avoid most duplications. However, experience will indicate whether or not a third search by author should be attempted after the initial call number and title searches. In any case, do not add a new bibliographic record unless you are sure that the record does not already exist.

STEP 1: Search by call number

(NOTE: IF THE BOOK IS PART OF A MULTI-VOLUME SET, SEE PAGE 3)

a) In the Bibliographic Query function (QRY), type FUL in the Command field (send) to obtain a full display.
b) Search by call number (search type C).
If a single book record is displayed, examine the record to be sure it matches the book to be entered, i.e., does it show the same:

1. Call Number
2. Author
3. Title
4. LC Card Number
5. ISBN Number
6. Imprint Date

(See Fig. 1, Sample display, next page)

USE CAUTION, because if the system cannot make an exact match, it may display the closest single record it can find. If you have an exact match, add a copy to that bibliographic record (ADD CPY).

If no direct match is made by call number, proceed to STEP 2, below.

STEP 2: Search by title

a) Search by title (search type T) to see if another library has already created a record for the book. If so, it will probably have a different call number.
b) If the system cannot make a direct match it will display a list of the closest titles it can find:

-If the title does not appear at all, go to STEP 3.

-If the book to be added has a common title (e.g., Autobiography, Introduction to chemistry, etc.), and several listings are given, start with the first occurence of the title and browse forward (BRW). Check each title's bibliographic information, other than the call number, to see if it matches the book to be entered. If a matching record is found, go to d), below.

c) If the system makes a direct match, examine the record to see if all the bibliographic information, except the call number, matches the book to be entered. If not, go to Step 3. Again, use caution as the system may display the single closest record it can find.

d) If the correct bibliographic record is found during b) or c), above, with a different call number:

-Press the UPD Key to highlight the record for editing.

-Leave one space to the right of the existing call number, type "$b" (i.e., a dollar sign and a small 'b'), leave another space, and type the call number of the book to be entered.

-Press the "send" key and wait until the update has been accepted.

-Now add the new copy to that bibliographic record (ADD CPY).

STEP 3: Add a new record

When no matching record is found, a new record must be created. To do this, press ADD key, or type ADD in the Command field and send, then follow the DATA ENTRY GUIDELINES on page 5.

NOTE: IF THERE IS ANY DOUBT AS TO WHETHER OR NOT A RECORD ALREADY EXISTS FOR A GIVEN BOOK, DO A THIRD SEARCH BY AUTHOR BEFORE YOU ADD A NEW RECORD TO THE SYSTEM.

EXCEPTIONS TO THE GENERAL RULE:

MULTI-VOLUME SETS

When the book in question is part of a multi-volume set, and the call number contains the volume number, do not include the volume number when searching by call number (search type C). The purpose of this is to allow the system to display any volume of the set present. If more than one volume is already in the system, they will be displayed as a list from which you must choose:

-If the list contains a record with the same volume number as the book to be added, display the full record. Examine the record and if it is the correct record, including volume number, add copy (ADD CPY).

-If the list contains one or more records with different volume numbers, and all other information is correct, type ADD in the command field and VOL in the subcommand field. (This actually copies the record and highlights it for editing, saving you the trouble of re-typing the entire record.)

-Usually, only the volume number will need to be changed, although, the author and title may also need updating. The add volume option also links the new record with the other volumes in the set.

-If there is no match at all by call number, proceed with STEP 2, above.

LEISURE READING MATERIAL

Leisure books are non-research material. They are located on A level and have a plastic covering. There are no call numbers because they do not belong to the NYU library.

To add this material to the system, search only by title, and then by author, if necessary. ADD or ADD CPY, as indicated in STEPs 2 and 3. Leave the question mark (?) in the ISCATS field, type BOBLEI in the MATERIAL TYPE field and BLeisr in the Library Location field.

Please note: all Leisure material has a loan period of two weeks for all borrowers. The system knows this ONLY by the material type BOBLEI.

DATA ENTRY GUIDELINES

Follow these guidelines when adding a new record or updating an existing record that does not already conform to the guidelines

Call Number: Type the number as it appears on the back of the title page, capital letters in capital letters, lower case in lower case, separating each Cutter number by a period, including the year if it is part of the call number. Leave no blank spaces in the call number field

Example:

	In the book		In the GEAC record
1.	BF 385 .5 .B832 D9 1979a	=	BF385.5.B832.D9.1979a

If the book is part of a nulti-volume set, type the call number, an asterisk (*), V., and the volume number

Example:

2.	PR 6005 .D97 A19 1961 v.5	=	PR6005.D97.A19.1961*V.5

Author: The author is denoted on the title page by two dots beneath the first letter of the last name, or institution name. Type the author's last name first, comma, first name, space, middle initial, period. Capitalize only the first letter in each name. Example: Brown,Francis E.

For multiple authors, leave a space after the first author, type $b, leave another space and add the next author in the same format as the first. This may be done for as many authors as will fit completely in the author field. NEVER separate multiple authors by "&" or the word "and". Example: Marx,Karl $b Engles,Friedrich

Do not include titles or degree abreviations in the

author field, such as PhD, Dr., or Sir.

Examples:

	In the book	In the GEAC record
1.	Joseph P. Arnon	Arnon,Joseph P.
2.	Dr. Annette Juliano	Juliano,Annette
3.	Gregory Lawler, Ph.D.	Lawler,Gregory
4.	Sir Judson Price	Price,Judson

Editors and Translators: If no author appears on the book, editors and/or translators may be typed into the author field to aid in searching. NEVER use abbreviations such as "(ed.)", "edit." or the word "editor", as this will be seen by the system as part of the editor's name.

Titles: The title is set off by slashes on the title page. Omit the initial English articles "a", "an", and "the", capitalize the first letter of the next word, and type the rest of the title in lower case, except for the first letters of proper names.
Examples:

	In the book	In the GEAC record
1.	The Automobile Industry Since 1945	Automobile industry since 1945
2.	A Successful Marriage	Successful marriage
3.	The Complete Poems of Emily Dickinson	Complete poems of Emily Dickinson

Do not use any abbreviations, including "&", "Intro.", or "U.S.". The only exception to this is the abbreviation used as part of the title, such as in the title "Harlem,U.S.A.".
Example:

In the book	In the GEAC record
The Once & Future King	Once and future King

LC Card and ISBN Numbers: Enter these as they appear on the back of the title page with all punctuation. If no LC Card or ISBN numbers appear, leave these fields blank.

Imprint: This is the year of the last printing. Enter it as it appears on the back or the front of the title page, and use the space bar to "space out" the last two characters in that field.
Example:

Before Imprint is typed	IMPRNT : UNKNWN
After Imprint is typed	IMPRNT : 1983WN
Characters spaced out	IMPRNT : 1983

Price: The estimated price of all books is $19.00. Do not type a dollar sign. The field must contain 5 numbers and a decimal point.
Example:

Before price is typed	PRICE : 000.00
After price is typed	PRICE : 019.00

Entering the record: Look over the entry for errors and correct them. When all fields are correct, press the send key. The system will look the record over, accept it, and ask you to wand the new item barcode. Do so, then look up and enter the correct ISCATS, material type, and local copy number, if any. The local copy number appears beneath the call number on the back of the title page. Three digits must appear in the local copy number field.
Example:

In the book	In the GEAC record
HD 82 .T493 c.1 ——— copy number	LOCAL COPY NO: 001

Princeton University: DEPARTMENT

To Supervisors

DATE April 27, 1984

SUBJECT

FROM Maria Gopel -

INTER-OFFICE CORRESPONDENCE

The following five workshops are available to assist in training library staff.

LIBRARY-SKILLS WORKSHOPS:

I - Library of Congress and Richardson Call Numbers

II - Filing Rules I and II

III - Conducting the Reference Interview

IV - Binding Preparations

V - RLIN Searching Skills Workshop

These workshops will be repeated monthly. They are designed for employees who have a job-related need for the training.

If you are interested in more information about the workshops or if you would like to register one of your staff, please call Jo Ann Alexander (3191).

LIBRARY-SKILLS WORKSHOP V

Leaders - Cindy Clark
- Carol Tobin
- Amy Wattles

RLIN Searching Skills Workshop

PURPOSE

The workshop is designed to introduce participants to the searching capabilities of the RLIN system, and to the correct and efficient use of those capabilities. The focus of instruction is on the applications and conventions of the name (personal and corporate), title and subject indexes. Emphasis is placed on work at the RLIN terminal to develop searching strategies and techniques, and to become acquainted with the problems and pitfalls associated with different types of searches.

TARGET GROUP

All library staff who must use the RLIN database as a bibliographic tool or resource in their normal work routine.

PREREQUISITES

To enroll in the workshop, a staff member must have hands-on experience at the RLIN terminal and be able to conduct basic terminal operations such as logging on and off the system, performing simple searches and manipulating the various display formats. Supervisors may make arrangements to receive the prerequisite training for themselves or their support staff by contacting any of the workshop leaders prior to registration.

TIME AND PLACE

Each workshop is made up of four sessions:

- A lecture session: held Monday morning, 10:00 a.m.-12:00 noon in the Frelinghuysen Room.
- A demonstration and initial searching session: held Monday afternoons, 2:00-4:00 p.m. in the Administrative Services Office (Firestone, B-16-E).
- Individual searching practice sessions (2 hours per individual): to be arranged on an individual basis.
- A problem-solving and wrap-up session: held Friday afternoons, 2:00-4:00 p.m. in the Administrative Services Office (Firestone, B-16-E).

April workshops:

Date	Leader
Week of May 7-11, 1984	Amy Wattles
Week of May 21-25, 1984	Carol Tobin

Note: Registrants will be provided with an instructional manual entitled "Searching RLIN II." Registrants should read this manual before attending the workshop and bring the manual with them to the workshop sessions.

DEMONSTRATION SEARCHES

ISSN 0160-3086

0275-8466

0161-4105

0031-8906

0047-8318

0033-3557

LCCN

79-89704

72-717807

72-1361

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77-76926

79-647010

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PAUG82-B278

NJPG82-B7756

NJPG83-S122

NJPG83-B107

MIUG82-B5678

CAL

PN681.R55

2795.331.480

PS3558.I366xB6

UG1281.A8N94

TK9204.U55

HG77.C53

LDN

M45658

TP

Functional dependencies & the universal instance property in the realtional model of the database systems.

Men against the sea

Star Trek reader

Goodnight moon

Public library government, seven case studies

Women and language news

PN & PE

Michael W. Fox

Arthur Ransome

Fred N. Grayson

Arthur C. Clarke

Willa Cather

Virginia Woolf

CP

U. S. Congress. Joint Committee on Congressional Operations

League for Industrial Democracy

Princeton University. Library. Catalogue Maintenance Section

American Diabetes Association.

Kraft, Inc.

Tanzania. Geological Survey.

RT

Nippon Junkankigaku Shi

ALA Bulletin

Journal of library automation

Popular electronics

Tennis-badminton-squash guide

SP

Hostages--Iran

Princeton, N.J.--History

Political posters, Chinese

Great Britain--Statistics

Wilde, Oscar, 1854-1900--Biography

ADVANCED SEARCHING EXERCISES

In the space given below, write down your exact search (i.e., tp when bad things hap$) and the number of items it retrieved.

Each example is represented by at least one record in the system.

Feel free to try alternative strategies.

NUMBERS

1. 0303-402X

2. O-395-18018-X

3. SC77-209

4. NJPG 23477334-B

5. E185.2.B85 1980

TITLES

1. L'Empire des signes

2. Truth or Consequences traffic study

3. Time-Life library of art

4. The abc of Basic: an introduction to programming for librarians

5. Penguin English library; no. 48

6. 1066 and all that

7. Power and culture: the Japanese-American war, 1941-1945

8. AAHE-ERIC/Higher education research report

9. Bulletin (Society for Italic Handwriting: 1982)

TITLES

10. AASHTO quarterly

11. Ruses d'intelligence

13. Asymptotic optimal inference for non-ergodic models

PERSONAL NAMES

1. Manuel Alvarez Morales

2. Madeleine L'Engle

3. Fu-jeng Tung

4. Elisabeth Kübler-Ross

(pp 4-7 not included in kit)

RLIN Terminal Demonstration Checklist

____ How to logon

____How to chain commands

____How to resume

____How to do an 'add-on' search

____What MCS records look like and how to access them

____What the sho commands do

____ Show or read off examples of searches and their cost

SCOPE OF IBM PC TRAINING

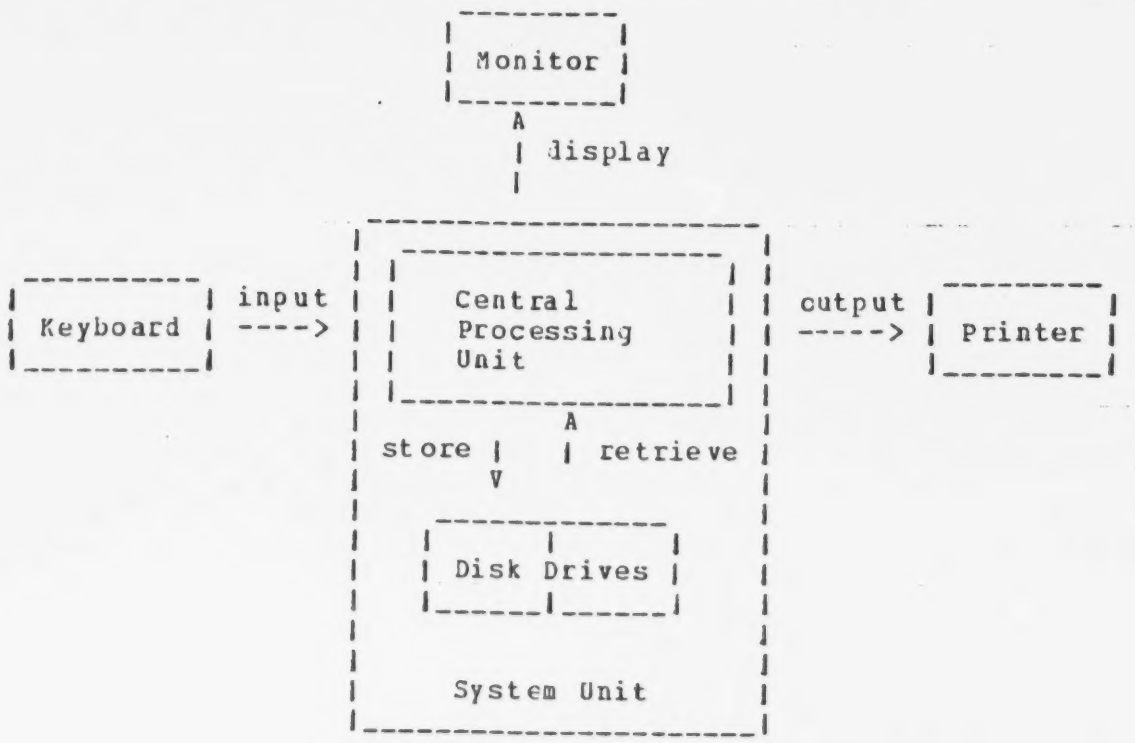
* TRAINING FOR ALL NEW RECIPIENTS OF PC'S
    - ORIENTATION TO MACHINE
    - DOS
    - CONTRACT FOR GROUP MULTIMATE TRAINING
* PROVIDE SAMSON TRAINING AS REQUESTED (WYLBUR IS PREREQUISITE)
* AS RESOURSES PERMIT:
    - PROVIDE LOTUS 1-2-3 TRAINING
    - PROVIDE DATAEASE INSTRUCTION AND DATABASE DESIGN ASSISTANCE

IBM PC ORIENTATION AND PC-DOS TRAINING SEQUENCE

1. Delivery of PC or XT
2. A 1-hour session introducing the trainee to machine and DOS
3. Trainee practice and exploration period guided by:
    - A set of notes giving step by step instructions
    - The IBM DOS training disk and "DOS User's Guide"
    - A listing of other books, disks & videotapes available
4. A self-administered test of trainee's competency
5. A 1-hour review session and introduction to advanced topics
6. For XT owners, an extra hour to cover hard disk, trees, & backup
7. Additional help as needed on an on-going basis provided by:
    - Unit contact person or designee
    - Users' group
    - Phone calls to Systems Office
    - Newsletters and problem notes
    - A list of recommended software and hardware supplies

RNA 8/20/84

Figure 1. Schematic diagram of a personal computer. DRAFT



* Function of a computer (input/process/output)

1. The user inputs program and data (numbers and/or text) from keyboard, disk, or other device.
   Data is converted to sequences of electrical signals which are represented symbolically by strings of 0's and 1's (binary digits = bits). Each text character is converted into a unique sequence of 8 bits. (8 bits = 1 byte)
   The coding scheme most commonly used is called ASCII. (ASCII = American Standard Code for Information Interchange)
   It may take 16, 32, or more bits to represent a number.

2. The program processes the data
   The task is broken down into a sequence of small steps. Each step involves an arithmetic or logical operation on a portion of the data (manipulation of the 0's and 1's). These operations are performed at a rate measured in MIPS (MIPS = Millions of Instructions Per Second).
   The usual effect is to transfer data (e.g. to the printer), to modify data (e.g. to replace one character with another), or to create new data (e.g. a sum of the numbers input).

3. The program outputs value-added information to the monitor, the printer, or the disk drive.

DRAFT

* The machine and its components (hardware)
[Refer to IBM "Guide to Operations" manual]

* Keyboard (See pages _____ of "Guide to Operations")

Note:
Typewriter area in middle
(close to standard, but some important differences),
Numeric keypad on right
(also used with some programs for changing
your location in a document or spreadsheet)
Special function keys on left
(produce programmed sequences of keystrokes).

* Monitor (see pages _____ in "Guide to Operations")

Monitors come in two flavors:

Monochrome display (monochrome = one color)
IBM's screen is green, Amdek's is amber.
Used mainly for text editing.
Can only be used for graphics if you have special hardware.

RGB color graphic display (RGB = red,green,blue)
Good for charts and graphs,
but any text displayed looks fuzzy.

* Printer (see pages _____ in "Guide to Operations"
or consult the manual supplied with your printer).

There are a large variety of printers available
falling into the following four major categories:

Dot-matrix printers
Fast and relatively inexpensive,
some are capable of producing graphics output,
but only a few can produce high quality characters.
Most produce a high pitch noise while printing.

Daisy-wheel or thimble printers
Produces letter quality output.
In general, more expensive than dot matrix printers.
Slow, noisy, and difficult or impossible to do graphics.

Ink-jet printers (Hewlett Packard Thinkjet printer)
Letter quality text and graphics output.
Low cost, low noise, high speed.
Requires special paper (else ink diffuses making text fuzzy)

Laser printers (Hewlett Packard Laser Jet printer)
Good quality text output (similar to Xerox copies).
Extremely fast (whole page printed at a time).
Very quiet and very expensive.
Cannot, at present, produce graphics output.

DRAFT

* System Unit (the brain and central nervous system of the computer)

Includes the following components:

Central Processing Unit (CPU)
Performs arithmetic and logical operations and
supervises the operation of the entire computer system.
Consists of an Intel 8088 microprocessor chip.
(A chip = an integrated circuit = an IC)

Primary memory area (also called main or core memory)
Holds program and data currently being acted upon.
Consists of arrays of 64K RAM chips (1K = 1024 bits).
(RAM = Random Access Memory = read/write memory)
Size of memory is measured in bytes (= characters).
IBM PC & XT now come with 256 Kilobytes of RAM
(enough room to hold about 80 pages of text).
Access to data is very fast (millionths of a second).
Memory is "volatile" = goes away when power is off.

Read Only Memory (ROM) area contains programs loaded at factory
which are stored permanently and cannot be altered.
One of the programs stored here wakes the computer up
(like a cup of coffee in the morning)
when the power is turned on.

Ancillary circuits and other devices including
A clock,
a data bus which acts as the central nervous system,
circuit boards (sometimes called cards) which
are used to provide interfaces with peripheral devices.
(keyboard, monitor, printer, disk drives, etc.)

* Disk Drives

Although located in the system unit,
disk drives are treated as if they separate components.

Disk drives can be considered to be a cross between
a phonograph turntable and a tape deck.
Disk storage uses a non-volatile magnetic media which is
what you might imagine you would get if you coated a
phonograph record with the stuff magnetic tape is made of.
Information is written or read by a disk head
(whose function is analogous to a phongraph needle).
As program runs, data is transferred back and forth.

Disks provide a place to store
larger amounts of information
in a more permanent form,
at a lower unit cost,
but with much slower access rates
than allowed by primary memory.

Two types of disk drives may be installed:

Diskette drives (diskette = floppy disk)
Double-sided, double-density diskettes hold 360K
(enough room for about 100 pages of text).
Diskettes can be inserted and removed.

DRAFT

Fixed Disk (= Hard Disk) drive
is available on IBM XT only,
uses metal disks instead of plastic,
holds volume of 30 diskettes (10 Megabytes),
can transfer data faster than diskettes.
Disk cannot be removed, therefore called "fixed".

* Diskette construction

Flexible mylar disk coated with magnetic substance spins inside
a plastic impregnated cardboard jacket.
The disk read/write head makes contact through a slot in jacket.
If the notch on the edge of the jacket is covered,
the disk can only be read. (it is then "write-protected".)

* Proper handling of diskettes

Handle only by the cardboard jacket.
(keep fingers off recording surface.)
Do not bend or place heavy objects on them.
Do not write on labels with hard tipped pen or pencil.
(use felt-tipped pen once label has been attached.)
Store diskettes in the original box or a diskette holder.
Keep at least a foot away from magnets, including motors
(e.g. fans, telephones, answering machines, dictation equipment.)
Keep away from heat, cigarette smoke, food, and dust.

* The DOS diskette

Located in the back of the DOS manual is a diskette
containing IBM's Disk Operating System. This diskette
cost you $45, so handle it with care.

* What is DOS?

DOS is a program that runs inside of the IBM PC and which
controls the CPU and the transfer of data between all of the PC's
components. It is called a DISK operating system because
a lot of data transfer involves the disk drives.

You can think of DOS as your combination servant and file clerk
It responds to your commands and manages your filing system.
Even when you are using another program, such as a word
processor, DOS is still present in the background, working
together with the other program.

* Starting up the machine ("Booting PC-DOS")

Actually, however, DOS is not present in the machine when
it is shut off. When the machine is shut off, no programs
are running, and even turning the machine on does not
automatically start the DOS program running.
(If you turn on the machine without any diskette in drive A:
you are placed into a BASIC program loaded from ROM memory.)

To make DOS start running you have to go through a procedure
somewhat akin to rubbing Aladdin's lamp to coax out the Genie.
In a way, it's like magic, because you need a program in memory
before you can load another program. This chicken and egg

situation is resolved by having the computer lift itself up by its bootstraps (hence "booting" the system). A tiny program in ROM memory gets the ball rolling by loading in a little bit bigger program off of the diskette into the CPU, which in turn loads the main program of DOS into the CPU and starts it running.

To boot DOS, insert a diskette containing the DOS programs into the left disk drive (this drive is called drive A:). The diskette is inserted with label side up and toward you. Close the drive door (push down metal lever in the middle).

Flip switch on right rear side of System Unit to up position. If you have an Amdek monitor, turn it on after System Unit. There will be a long pause while the computer checks itself out. The computer then begins to read in the DOS program from the disk (notice that the light on the disk drive goes on whenever data is being transferred to or from the disk).

* Entering the date and time

The first thing you should see on the screen is a request to enter the correct date. Do so by entering the numbers for the month, day, and year separated by dashes (-) or slashes (/). Do not include any blank spaces.

Similarly, you should enter the numbers for the hour and minutes after the hour separated by a colon (:). If it is after 1:00, add 12 to the hour figure (1:00 + 12:00 = 13:00).

The date and time are used to put a date stamp on any files you may create during a work session. If you do not intend to create or modify any files, you may just hit return twice (thus signifying your acceptance of the date and time offered).

* The DOS prompt

Once the DOS program is running it will issue a prompt that looks like this:

A>

The A signifies that you have booted DOS from the A: drive. It also signals that any commands you may give will refer to the diskette in the A: drive, unless you otherwise specify.

* DOS Commands

DATE and TIME are examples of DOS commands. These two commands are special in that they are automatically executed when you start up the computer. You can, however, execute them at any time. For instance, if you type DATE, you are shown the current DATE, and are offered a chance to change to a new date.

DOS commands, like commands to most computer programs, consist of up to three parts. First there is a KEYWORD, which lets DOS know which command is being used. The keyword must be typed exactly as shown in these examples or in the DOS manual. Next there may be one or more modifying "switches", which can in most cases be omitted. Finally, there may be one or more arguments to the command, which will usually be the names of

files. DATE and TIME do not require arguments, but most of the commands you will be using do need them (e.g. TYPE filename).

* The cursor

By now you will have noticed the blinking patch of light on the screen that shows where the next character you type will appear. This typing aid is called a cursor. It fills the same function as the cross-hair sight on a typewiter.

* Using the IBM keyboard

It is somewhat of a mystery why IBM abandoned it's Selectric style keyboard for that of the PC. If you are used to a standard keyboard, it will take a little getting used to.

Fortunately, all the normal keys are there, but some of them have symbols on them instead of names. For instance, the shift keys are marked with upward pointing thick arrows. The return key has an arrow that curves down and to the left (symbolizing a combination of carriage return and line feed). Note that this key is called the "Enter" key in all IBM literature and in user's manuals for any programs written for the PC. Most of the time, when you enter a command, you must then hit the Enter key to signal the computer that you have completed the command line.

A few comments about the Caps lock key. It is an example of a toggle switch. You turn it on and off by hitting it. Hit it once and Caps lock mode is ON. Hit it again, Caps are OFF. Hitting the shift key when Caps lock is ON does not turn Caps lock mode OFF permanently. What happens instead is curious--you get lower case letters as long as you hold the shift key down, but when you let it up you are back to Caps lock mode. Note: Caps lock mode does not affect anything but letters.

* Entering numbers

You can enter numbers using the keys at the top of the keyboard or on the keypad to the right. Some programs make use of the cursor control keys on the numeric keypad, however, in which case you have to use the number keys in the center, or use the Num Lock key to toggle back and forth between cursor control mode and number mode.

* Correcting typing mistakes

If you make a mistake while entering a DOS command, you can use the backspace key to back up and delete the character you just typed. (it's the key with in the top row that has a leftward pointing arrow (<--). You may delete as many characters as you want this way. To cancel an entire line and start over, hit the key marked Esc (for Escape). Once you have hit the Enter key, though, it is too late to do any of this.

That's enough about the keyboard for now. You should read chapters 1 and 3 of the IBM "Guide to Operations" manual supplied with the PC to get the full description of the keyboard (and the rest of the computer).

DRAFT

* Files

As mentioned earlier, diskettes are used to store programs and data. We will now turn our attention to the WAY information is stored on a diskette.

All information stored on a diskette is organized into structures called files which are parked in regions of the diskette called tracks. Although there is no shortage of technical details available concerning how DOS stores and keeps tabs on the location of these files, you only need to be concerned about such details as the name, size, content, and date and time of creation of any file you will be using. DOS takes care of all the bookeeping.

A computer file is like a manila file folder containing a document. When you tell DOS to store it on a diskette, it's like giving a file folder to a filing clerk. You needn't know exactly where it ended up as long as you know you can get it back.

Of course its not quite as simple as that. For one thing, you have to be careful not to overfill a disk. You have to be careful not to throw away a file you may want later. (Once you erase a file, it's gone forever). And to protect against disasters, you should keep backup copies of your important files.

We'll learn below how to examine a diskette, how to look at the contents of a file, how to change the name of a file, how to erase unwanted files, and how to make copies of files and of whole diskettes.

* The CHKDSK command

If you type CHKDSK you will be given a summary of the number of bytes of diskette storage you have used up in the current disk and the number of bytes you still have free. You can make some sense of this by remembering that a byte holds a character and that a normal page holds about 50 rows of 60 characters = 300 characters/page. If your pages have more or fewer rows or characters per line, then you will have to adjust this formula accordingly.

You get the same information given by CHKDSK at the end of a DIR command (discused below).

* The DIR command

Since the DOS diskette is already in drive A:, let's take a look at its file directory. Type "DIR", then hit the Enter key. (Note that you don't have to type DOS commands in upper case, but that I will so they stand out in this narrative.) What you should see appearing is a list that includes such file names as FORMAT.COM, DISKCOPY.COM, and PRINT.COM.

These are files which DOS uses when it performs the FORMAT, DISKCOPY, and PRINT commands. Note that there is no DIR.COM file. That's because some of DOS is always in the CPU,

including the program modules for performing the DIR, RENAME, ERASE, and COPY commands.

* Freezing the display

Sometimes when you do a directory, the information passes by so fast that you miss some of it. There are two ways you can control this problem. One way is to hold down the key marked Ctrl and then hit the Num Lock key (at top right). This freezes the display at the spot where you hit the combination of keys. To resume the scrolling of the display, hit any key. It takes a little bit of practice to get the hang of this technique.

A second method is to use the DIR command with the /P switch (P for pause). Try it by typing "DIR/P". Using this method you get a screenful of information then the scrolling stops by itself. To resume scrolling, hit the Enter key.

* Searching for an individual file

You can also use DIR to search a diskette for an individual file. To do so, just type DIR followed by the name of the file you are looking for (e.g. "DIR COMMAND.COM").

* Looking at drive B:

Up 'till now we've only been concerned with drive A:. What do we do when there are diskettes in both drives? In that case, we need to include the argument B: after the DIR command if we want a list of the files on the diskette in drive B: (Type "DIR B:").

* Changing the default drive

Sometimes you will be referring to files on drive B: very frequently. In that case you may want to tell the computer to automatically look at drive B: even if you omit the drive specification from your commands.

To change default drive, just type in the name of the new default drive (e.g. A>B:). From now until you change it back, the prompt will be B> instead of A> and all commands will look at B: unless you specify A:.

* The TYPE command

Assuming you have inserted a diskette containing some text files in drive B:, let's try out the TYPE command. To use the type command, just type "TYPE filename". The contents of the file will be displayed on the monitor.

Note that this command only works well with some files. The document files of some wordprocessors (such as Mulltimate) contain special characters used to control display format. Other files, such as COMMAND.COM contain mostly machine language instructions. These files will look strange on the screen, but they will not harm it. Don't try to PRINT files like that, however. 74

the PRINT command

The PRINT command acts like the TYPE command, except that the text display is directed to the printer instead of the monitor. Note that if you have made B: the default drive and have DOS in drive A:, then you will have to include a reference to A: in front of the DOS command (A:PRINT) or you will have to change default drive again (B>A:), then include a reference to B: in the filename (PRINT B:file).

* RENAME

If you want to change the name of a file, you need to use the RENAME command. This command is fairly straightforward. You just type "RENAME oldname newname".

There are some rules you will need to know about filenames, however. A filename consists of two parts: 1) a file name consisting of from 1 to 8 characters and 2) an optional 1 to 3 character extension. The file name and extension are separated by a period and no spaces. The characters which can be used in filenames are: all letters, all numbers, and the special characters ! @ # $ % & ( ) - _ { } ' Naturally a name like #$@&_ would make little sense, even though it is legal.

You are not allowed to use any names of DOS commands or the device names AUX, COM1, COM2, CON, LPT, LPT2, LPT3, NUL, or PRN. If you do you will get an error message.

* COPY

COPY operates like RENAME, except that you end up with two duplicate copies of the same file afterwards.

You can use COPY to transfer an individual file from one disk to another (e.g. COPY A:filename.ext B:), in which case the name of the file created is ususally allowed to default to the same as the original filename. (You can give it a different name if you want.)

You can also make a second copy of a file on the same diskette as the original, but in this case the name MUST be different (COPY filename.ext name2.ext).

* ERASE

ERASE is so simple to use it's dangerous. Just type "ERASE filename" and the file will be gone forever. At first you'll be hesitant to erase anything for fear you'll make a mistake, but as you build confidence, you'll find this an essential part of your housekeeping arsenal. Sooner than you imagine your directory gets cluttered up with files you created temporarily on the way to some final product. It's best to deal with these temporary files while you still remember what they were for and how expendible they are.

* The DISKCOPY command

Sometimes you will want to copy the entire contents of a disk onto another disk. The usual reason for doing this is to make a backup copy of software or data so that unforseen circumstances do not lead to a tragedy. One cup of coffee on a disk and there goes the accounting system! Sometimes your data can get wiped out by a machine failure. A human hair in the wrong place can cause a disk head crash (ouch!).

To make a backup copy type "DISKCOPY A: B:", then put the source diskette in drive A: and the destination diskette in drive B: and hit any key to start the copy process.

* The DISKCOMP command

After making a copy of a disk, you should use the DISKCOMP command to compare the copy to the original. When the IBM PC copies files it doesn't do any error checking. A dropped bit in a number could change $127 to $63. It's not so crucial in text, because the errors would be more obvious. Program files too should be checked, or they might blow up later when the are run.

For all my cautions, you should be reassured that copy errors are relatively rare in practive.

* The COMP command

The COMP command is to COPY, what the DISKCOMP command is to DISKCOPY.

* The FORMAT command

One final command, and an important one. Before you can use a diskette to hold files, it must be formatted. The FORMAT command checks out the diskette for bad sectors and sets up a directory file so that DOS will be able to keep track of where to place and find files.

You need to format a disk before you COPY files onto it, or before you use it as a disk to contain word processing documents which might be put on it by a pprogram.

You do not need to format a disk before using the DISKCOPY command, however, as that command includes a formatting step.

ONLINE CATALOG TRAINING PROGRAM FOR PUBLIC SERVICES STAFF AT THE GENERAL LIBRARIES, THE UNIVERSITY OF TEXAS AT AUSTIN, FALL 1984

BACKGROUND

This training program prepared 100 staff members to assist users in a public test of the locally developed UT Library Online Catalog. This group included regular public services staff from the four test sites as well as a number of staff from various library departments who volunteer at the Information Desk in the Perry-Castaneda Library (PCL). Though some had worked with the circulation system on which the Online Catalog is based, and some had participated in a preliminary demonstration/test of the system in March 1984, few were familiar with the current version.

Planning for staff training began about three months before the public test was to begin. Though the Online Catalog system is designed to be self-explanatory, staff training was necessary so that staff could answer questions and help users solve problems from "Day One" of the test.

GOALS

(1) To communicate information concerning the Online Catalog data base, displays, and commands.

(2) To develop a positive staff attitude toward this evolving system.

(3) To build a trained cadre of library staff members willing and able to train others.

(4) To provide hands-on terminal training with a trainer for all interested staff members.

OBJECTIVES

The training was designed to enable staff to:

-- begin and end a session
-- construct an author, title, keyword title, or call number search
-- broaden or narrow searches for greatest effectiveness
-- use the terminal to type commands, make corrections, etc.
-- view and interpret results, error messages, etc.
-- handle problems such as long response times or system going down
-- explain the system to users
-- communicate a positive attitude to users
-- get more help if necessary.

STEPS IN TRAINING

General Sessions, 1-1/2 hours long, for all staff identified as "priority one"--i.e., those who would be dealing with users in the test locations. These sessions used a lecture/discussion method to cover:

-- goals of the training program
-- development of the Online Catalog; plans for the forthcoming public test.
-- system description: database, access points, organization of data, typical search sequence.
-- screen displays: search, help, and results screens; audit messages; item status displays.
-- public service aspects: what to expect (user attitudes with other online catalogs); helping the user become independent; user aids available.

Before the sessions, participants received the Online Catalog "User's Guide" and "Q&A: Explaining the Online Catalog to the Public." Sessions were evaluated using forms filled out by participants.

Training of cadre of selected trainers from each affected unit consisted of small-group hands-on sessions, stressing actual terminal operation (logging on/off, trying various searches, generating audit messages, interpreting search results). A printed series of "Training and Practice Exercises" was used in these sessions.

Hands-on Training for other staff was conducted by the cadre of trainers in small-group sessions based on a sign-up conducted at the end of each general session. This level of training also stressed practical terminal operations and a variety of searches, and used the "Training and Practice Exercises."

MEMBERS OF THE STAFF TRAINING GROUP

Sherrie Schmidt, Information Systems Librarian (chair)
Nancy Elder, Head, Science Library
John Kupersmith, Assistant for Public Services Programs
Bob Stewart, Assistant Head, Humanities Research Center
Cataloging Department

ATTACHMENTS

-- "User's Guide"
-- 3 diagrams used as transparencies in general sessions
-- "Online Catalog Status Displays" sheet, with explanation and follow-up suggestions for each status
-- "Q&A: Explaining the Online Catalog to the Public" (portions)
-- "Training and Practice Exercises" (portions)
-- Evaluation form

UT Library
Online Catalog

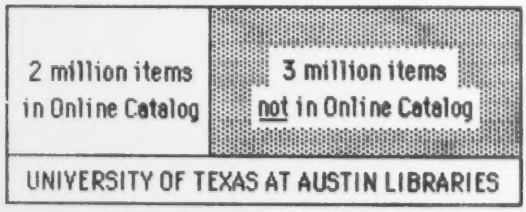
User's Guide

Revised August 14, 1984

What is the Online Catalog?

A computerized file containing records for over 2 million items (mostly books and periodicals) in the UT/Austin libraries. You can search the Online Catalog to get lists of items or information about a particular item, including its current status (checked out, etc.).

A supplement to the card catalog. The Online Catalog does not include all items in the UT libraries. It does include most items added to the collections since 1971 and some older items in the Perry-Castañeda Library (PCL), the Undergraduate Library, and the branch libraries. It includes very few items in the Humanities Research Center, the Tarlton Law Library, the Barker Texas History Center, or the Middle East, Asian, or South Asian Collections.

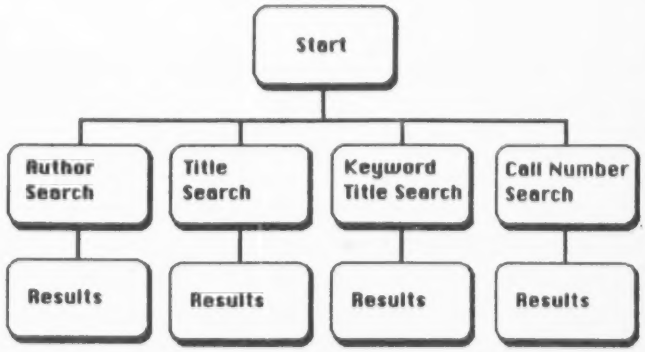


A test, now available in PCL and the Science and Engineering Libraries. We want to know what you think of the Online Catalog system; to make a comment, press the **Comment** key.

Easy to use. Just follow instructions on each screen. You can't damage the system or erase data. For more help when searching or viewing results, press the **Help** key.

How the Online Catalog works

Always start by pressing the **Start** key. You can then do one of four different searches:



The computer always looks for records that exactly match what you type on the terminal. For best results, experiment! If your first search doesn't work, or for more complete searching, try several possibilities. Alternative spellings, abbreviations, or other variations will get different results.

After any search, you will see a **Results** screen, showing information about relevant items and their status. In Author, Title, and

Call Number Searches, the computer opens the Online Catalog file at the point where you told it to look; you can then page forward (but not back) through the file. In a Keyword Title Search, the computer retrieves a specific group of records that match your search request; you can then page forward through these records.

To finish your session at the terminal, press the **End** key.

Author Search

When: Use the Author Search when you want to find items by an author (which may be a person or an organization).

How: Type as much of the name as you know.

For best results: At present, the Online Catalog records are not standardized like those in the card catalog. For most complete searching, try several forms of the name you want, including alternative spellings and abbreviations.

To find:	everything in the Online Catalog by Edgar Allan Poe
Search:	POE, EDGAR ALLAN
Then:	POE, EDGAR A
Then:	POE, E A
Then:	POE
(... etc.)	

To find:	everything in the Online Catalog by United States. Bureau of Mines.
Search:	UNITED STATES BUREAU OF MINES
Then:	U S BUREAU OF MINES
Then:	US BUR OF MINES
Then:	BUREAU OF MINES
(... etc.)	

Title Search

When: The Title Search is like looking up a title in the card catalog. Use it when you are sure you know the beginning of the title.

How: Type the first words of the title in exact order. Omit the first word if it is an article. You may leave off words at the end of the title.

To find:	The American Nation: A History
Search:	AMERICAN NATION

For best results: If your first search doesn't work, try variant forms of the words in the title or try a Keyword Title Search. If you're not sure of the exact title you want to search, try a Keyword Title Search using likely words.

Keyword Title Search

When: The Keyword Title Search is different from anything you can do with the card catalog. Use it when you know significant words in the title of a particular item you want to find, or that might be in titles you'd like to see. In effect, you can use the Keyword Title Search as a rough subject search.

How: Type any meaningful or significant words from the title in any order.

For best results: The Keyword Title Search retrieves a specific group of items that match your request. To be retrieved, a title must contain all the keywords you requested, spelled exactly as you typed them. For the most complete results, try several different searches on alternative spellings, abbreviations, or word combinations, as in

this example:

> To find items with the title words "integrated circuits," search INTEGRATED CIRCUITS. To find some related items, search INTEGRATED CIRCUIT, IC, etc.

If your first search gets too many items, narrow it by adding an additional keyword. If your first search gets too few items, broaden it by removing a keyword. Avoid very general keywords such as "business" or "energy," unless they are combined with more specific words.

Call Number Search

When: You can use the Call Number Search in two ways:

(1) To check the status of a specific item when you know its call number. Do this by typing the complete call number.

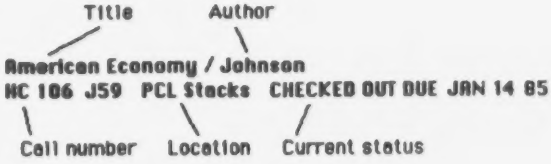
(2) To "browse" through listings of items on a certain subject, in the same way that you would browse through books on the shelf. Do this by typing the first line or two of a relevant call number. Like browsing in the stacks, this will get you some--but not all--items on similar subjects.

How: Type the call number with a space after each part. Do not type the library name or a -q- or -f- (oversize book) symbol.

To find:	QC 370.5 C65 ENGIN	...type this: QC 370.5 C65
To find:	-q- 913.378 Ev15p MAIN	...type this: 913.378 EV15P

Using search results

Online Catalog search results give the title, author, call number, location, and current status of the item.



If the item is checked out, you may ask at the Circulation Desk to have it recalled for your use.

If the item is in a special location such as "PCL Reserves," you can often go to that location and use it.

If no current status is displayed, the item is not checked out and is probably on the shelf.

For best results: When in doubt about the meaning of an Online Catalog display, ask a library staff member. If you don't find what you want in the Online Catalog, try the card catalog or ask a library staff member for help.

Using the terminal

Use the keyboard like a typewriter. You may type UPPER CASE or lower case. The cursor, a lighted rectangle, always marks the space where your next character will appear. If you make a mistake in typing, press the **Back Space** key until the cursor is over the incorrect character, then type over your mistake.

Arrows and dotted lines (-> _ _ _) on the screen indicate the places where you may type. If you move the cursor outside these areas, the keyboard may "lock up"; to release it, press **Reset**, then **Tab**.

When you have typed your search request, press the **Enter** key to send it to the computer. As soon as you press **Enter**, the message "**INPUT INH**" or "**X SYSTEM**" will appear on the bottom line of the screen. This means that the computer is working on your request.

Instructions at the bottom of each screen list your options at that point and tell how to move to other screens. From most points in the system, you can begin a new search by typing a single letter: **A**=author, **T**=title, **K**=keyword title, **C**=call number.

Special keys

Start returns you to the Start screen.

News gets you the latest information on changes and new features in the system.

Help gets you more information about what to do.

Keybd gets you instructions on how to operate the keyboard.

Tab moves the cursor to another area on the screen for typing.

Reset, then **Tab**, releases a locked keyboard.

Enter sends your request to the computer.

Comment lets you type a comment or suggestion about the Online Catalog and send it by computer to the system designers.

End finishes your session at the terminal.

How to handle problems

You press **Enter**, the keyboard locks, and the message "**INPUT INH**" or "**X SYSTEM**" appears at the bottom of the screen: This is not a problem; it just means that the computer is working on your request.

You don't press **Enter**, but the keyboard locks and the message "**INPUT INH**" or the symbol ←🧍→ appears at the bottom of the screen: Press **Reset**, then **Tab**, to release the keyboard.

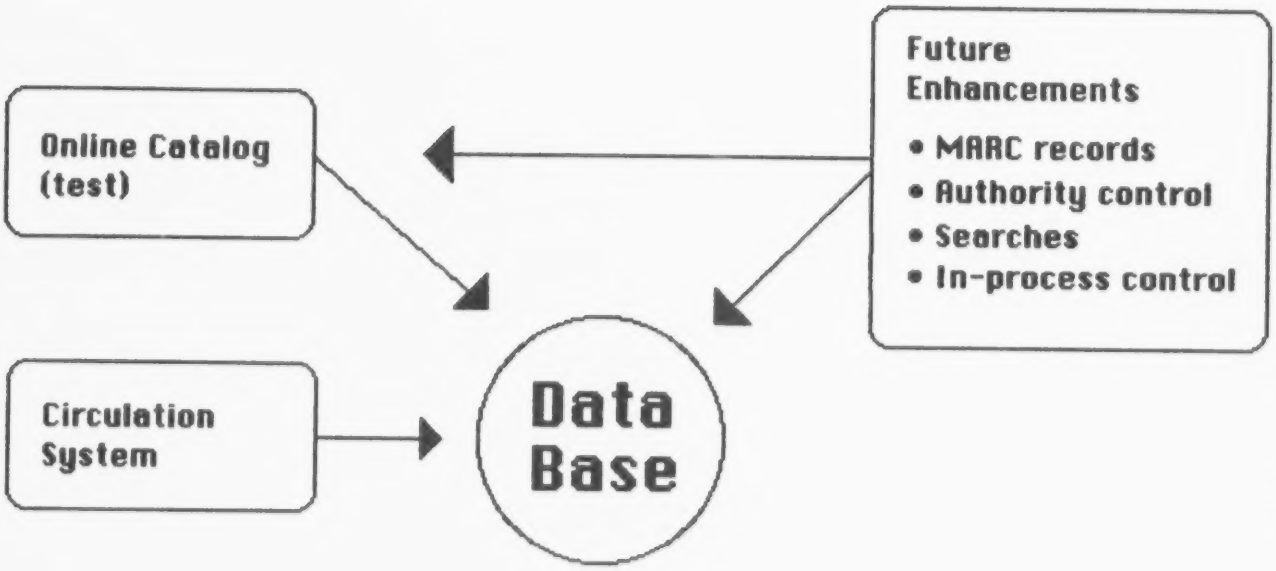
No response for more than a minute: Did you remember to press the **Enter** key? If so, ask a library staff member for help.

Problems moving from one screen to another: Look at the bottom of the screen to see your current options. If all else fails, press the **Start** key.

For more information

Ask a library staff member. We'll be glad to help you make the best possible use of the Online Catalog.

The General Libraries
The University of Texas at Austin



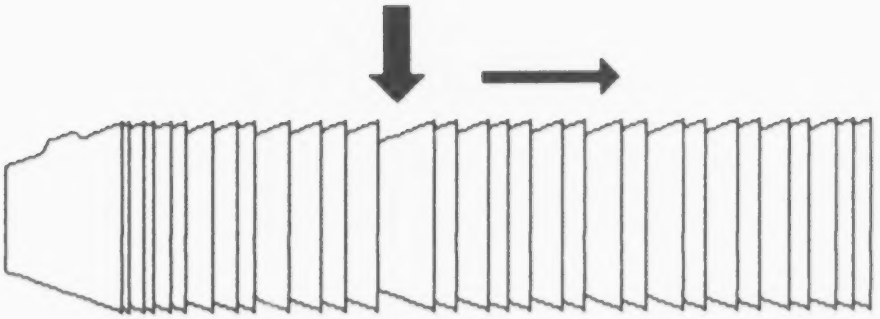
Transparency used in general sessions to illustrate development of the Online Catalog.

UNIVERSITY OF TEXAS AT AUSTIN

Author,

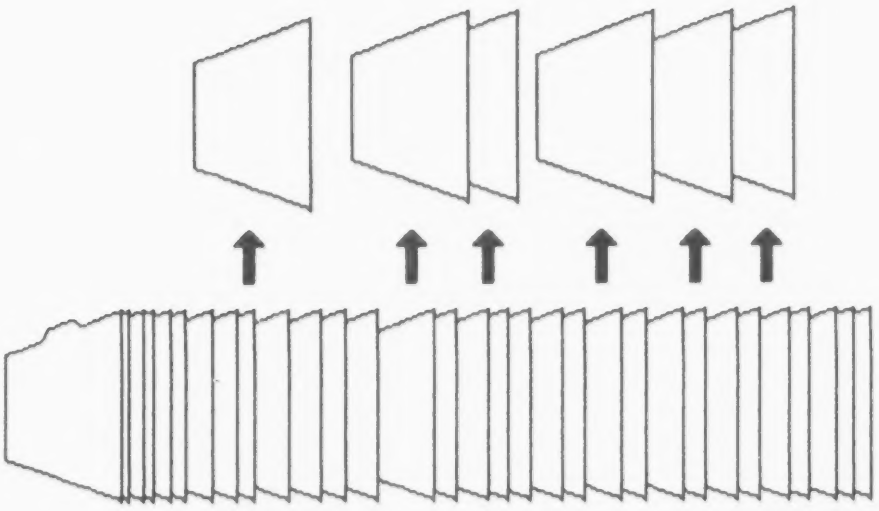
Title,

Call No.



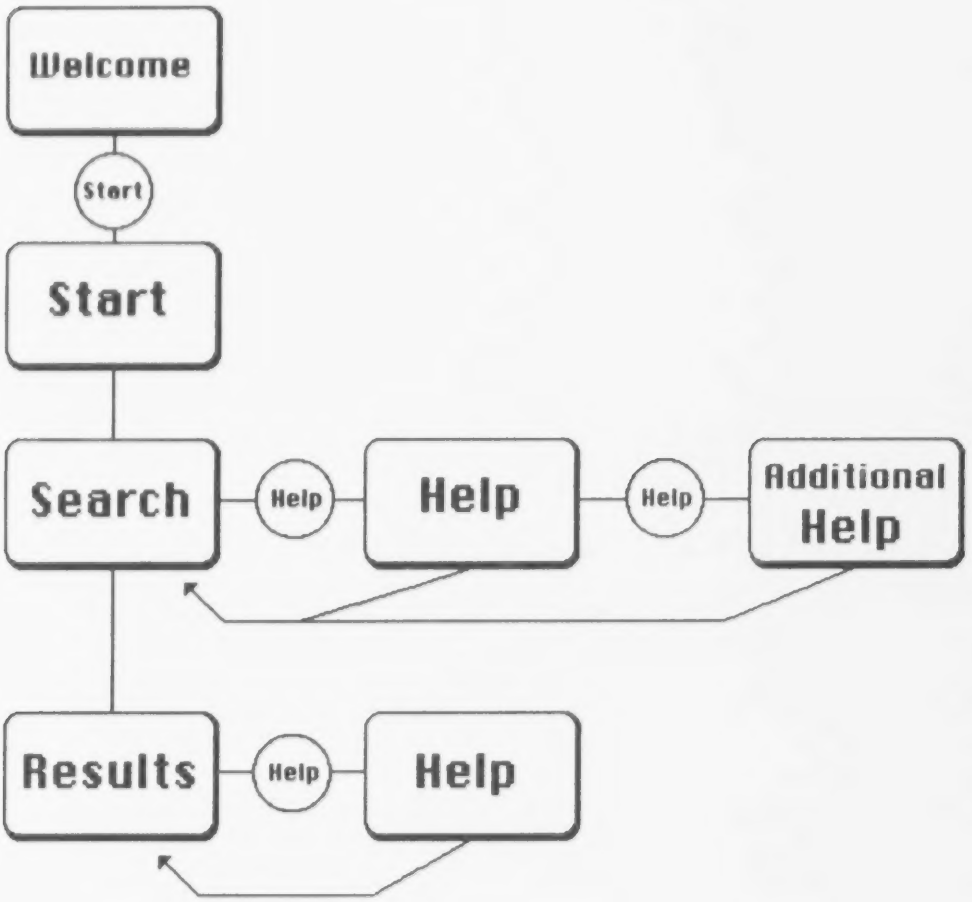
Keyword

Title



Transparency used in general sessions to illustrate how the Online Catalog performs various searches.

UNIVERSITY OF TEXAS AT AUSTIN



Transparency used in general sessions
to illustrate a typical search sequence.

UNIVERSITY OF TEXAS AT AUSTIN

ONLINE CATALOG STATUS DISPLAYS

- FOR STAFF USE ONLY -
(A version for the public will follow)

SAMPLE RECORD

```
          author                    title
            /                         /
ARNAUD, JACQUES, 1932- / BEAM AND FIBER OPTICS
QC 389 A76  Phys-Math-Astron Library  CHECKED OUT  DUE JAN 14 85
    /                     /                  /
call number           location           status
```

(NO STATUS DISPLAYED)

EXPLANATION: The item is not checked out and should be available.

FOLLOW-UP: Direct the user to location.

CHECKED OUT DUE [date]

EXPLANATION: The item is in circulation and due to be returned on the date displayed.

FOLLOW-UP: The user can place a recall or hold on the item at the circulation desk.

HELD FOR BORROWER

EXPLANATION: The item is being held at the circulation desk for a borrower who previously placed a recall or hold on the item.

FOLLOW-UP: The present user can place a hold on the item at the circulation desk.

OVERDUE

EXPLANATION: The item is Lost - either reported lost by the borrower or presumed by the library to have been lost.

FOLLOW-UP: The user should search all libraries in the online catalog and also search the card catalog. The user may be referred to Inter-Library Service if there isn't a copy available locally.

ITEM UNAVAILABLE

EXPLANATION: The item is either Missing or Withdrawn. (Withdrawn items continue to be displayed since there are records for them in card files.) If there is more than one copy with the identical author, title, and permanent location, any copy which is unavailable is not displayed.

FOLLOW-UP: The user should search all libraries in the online catalog and also search the card catalog. The user may be referred to Inter-Library Service if there isn't a copy available locally.

BEING BOUND
BEING PROCESSED

EXPLANATION: The item is charged to Bindery Preparation, Book Repair, or a "snag" unit in Bibliographic Control. No date of availability is given. Note: Under present procedures, not all items sent to these units have been charged to these locations and display these statuses.

FOLLOW-UP: The user can place a hold on the item awaiting its return to its permanent location.

NOT FOR PUBLIC DISTRIBUTION

Q&A

Explaining the Online Catalog to the public: questions & answers

These questions and answers are intended to stimulate thinking about situations that may arise at public service desks when the Online Catalog "goes public" and how you might handle them.

As with any other type of question, the goals are to provide accurate answers and communicate a positive attitude.

As you read this, please remember that it is intended as a starting point, not as a script to be recited or as a handout to be given to the public.

(Format based on Quotations from Chairman Joe, a staff training brochure for the microfiche catalog at the University of California, Berkeley, 1980)

The General Libraries • The University of Texas at Austin • 1984

QUESTION: What is this Online Catalog, anyway?

WRONG ANSWER: I've wondered about that too.

RIGHT ANSWER: It's a computer system we're testing right now. It gives you a new way to find information about books in the UT libraries.

QUESTION: Are all the UT libraries included?

WRONG ANSWER: Sure!

RIGHT ANSWER: No. There are more than 5 million books at UT, and the Online Catalog has records for about 2 million of them. It includes most items added to the General Libraries collections since 1971 plus some older items in PCL, UGL, and the branch libraries. But the Online Catalog includes very few items in the Humanities Research Center, the Tarlton Law Library, the Barker Texas History Center, or the Middle East, Asian, and South Asian Collections.

QUESTION: What information can you find?

WRONG ANSWER #1: Oh, not much really.

WRONG ANSWER #2: Anything you want!

RIGHT ANSWER: After you type in your search, the screen will display a list of items with their authors, titles, and call numbers--and it will also tell you whether an item is checked out, on reserve, at the bindery, or in some other special location. If the screen doesn't display a status for a particular item, then it's not checked out ... and probably on the shelf.

QUESTION: Can you do a search for me?

WRONG ANSWER: No, you have to do it yourself.

RIGHT ANSWER: The Online Catalog is designed so that it's easy to search. Just press the START key and then follow the instructions on the screen. There are some printed instructions, too--and feel free to check with me if you have a problem.

QUESTION: Is it like looking up books in the card catalog?

WRONG ANSWER #1: Yes.

WRONG ANSWER #2: No.

RIGHT ANSWER: In some ways it's like using the card catalog, but in some ways it's better. You can look up books in the Online Catalog by a certain author, or with a certain title, or with certain words, called "keywords," anywhere in the title. That means you can look up books on a topic even if you don't know their exact authors or titles in advance, as long as your keywords are in their titles. You can also look up a call number if that's what you want to search. Just remember that the Online Catalog isn't 100% complete; you may still need to look in the card catalog.

QUESTION: I looked up Edgar Allan Poe and there were some books listed, but I think you must have more.

WRONG ANSWER: No, don't worry, the computer knows everything.

RIGHT ANSWER: Yes, there might be more. Right now, the Online Catalog is using a data base developed for our circulation system. Not all the names and titles in that data base are standardized like those in the card catalog. To get the most books by Poe, try dropping off some of his name and searching under "Poe, E A"; then try just "Poe." Also, remember that not all the books at UT are listed in the Online Catalog: you might want to try the card catalog for a more complete search.

NOT FOR PUBLIC DISTRIBUTION

Training & Practice Exercises

for the UT Library Online Catalog

These axioms for guidance in searching the Online Catalog, and the accompanying exercises, are designed for staff who will be assisting the public during the Online Catalog test at PCL, Engineering, and Science.

Most of the time you will find searching the Online Catalog easy and rewarding within the limitations of the database. These exercises illustrate some of the exceptional cases and areas where care is needed in searching.

Remember that this is a test, a time for us to explore the Online Catalog, identify problem areas, and gain from the experience of staff and users. The Online Catalog is still evolving; no modifications will be made during the test period, but the results of the test will help in development of a system that will best serve our needs and those of our users.

The General Libraries • The University of Texas at Austin • 1984

☞ Axiom 1: If you found it, you found it; if you didn't, keep looking.

Axiom I is the overriding principle for searching the Online Catalog. The card catalog is always a suitable follow-up.

☞ Axiom 2: If at first you don't find it, try another form of the name.

Many names are quite straightforward for searching in the Online Catalog. Let's say a user is looking for books by geneticist Benjamin Lewin. If you enter **LEWIN, B** in an author search, the first couple of records you see are not relevant. The next record you see is for Benjamin Lewin. Paging forward you will find several more titles with only minor variation in the way the author's name is entered.

It is always best to omit punctuation in what you enter (except for the comma after the last name), since entries with punctuation sort after entries without. That way you won't miss any.

Try entering **LEWIN, B.** . You see a slightly different result. The books you are looking for could be under the form that was entered without a period at the end of the author or after initials.

Take a look at another easy example: Desmond Morris.
Enter **MORRIS, DESMOND** . You should find about 8 entries followed by 8 more with a period after the word desmond. If you page forward to the end you find one oddball entry, a typo, under **MORRIS, DESNUND** . For follow-up check **MORRIS, D** and you find three more entries. In this case it just happens that all three are additional copies of the titles you found under the more complete entry. However, if you neglect to check, you may miss relevant material which was not under the form you used.

GEAC DATA ENTRY MANUAL 10/25/84 Draft 10 BE/MM/DTF

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IV. System Functions

A. Help (F1 or HLP)

The Help command calls up an online manual to assist when you are lost, cannot remember a code, or are just curious.

Help is offered in these modes:

QRY (bibliographic query)	RES (reserve function)
FIN (financial transaction)	PAT (patron query)

Help is not offered here:

PUB (public query)	CHG (charge)
REN (renew)	DIS (discharge)
LIB (library maintenance)	MSG (message)

To get help, press F1 or types HLP in command field and press Send. Sometimes in Patron or Bibliographic Query, screen prompts you merely to type H.

1. General Help:
   Press F1, or enter HLP in command field and Send. This displays a description of the function you are in and explains how to get more specific information.

2. Help for Specific Commands:
   Type HLP as command and CMD as subcommand and Send to find out which commands are available in a certain function. (See Appendix C for sample screen.)

   Enter HLP as command and any other command as subcommand and Send to get help about a specific command such as FND, CPY. Screen displays information about that command and lists appropriate subcommands.

   To get options for search types in each function, type HLP as command, FND as subcommand, and press Send.

3. Help for Subcommands
   Enter HLP as command and HLP as subcommand and Send. Screen lists subcommands that have help texts when used with HLP. (See Appendix C for sample screen.)

B. Abort or Change (F2 or XXX)

To exit from a display on the screen and return to the original menu, press F2 or type XXX and Send.
Use this function to abort or cancel a process you began but do not wish to finish. Pressing F2 means "forget it."

Exceptions:
1. In Public Query, do not use F2 or XXX to abort. Instead, type X and Send.
2. In Message function, to abort while typing the message, do not use XXX. Use F2.
3. In Patron Query, in Add, New, or Update, use only F2 to abort.

System Functions, cont.

C. Messages (F9 or MSG)

Use the message function to send messages to another terminal in the network or to all the other terminals.
When a highlighted M shows in upper left of screen, a message has been sent to your terminal.

To see message, Press F9, or
Enter MSG as command and Send.

The message, its source, and date and time sent show on screen. If vertical arrow shows at end of message, press Send to continue to next screen for rest of message. If carets show on screen, more messages are waiting; press Send to see them.

As soon as you press F2, type XXX and Send, or change functions, the message is purged and cannot be recalled. Messages are also purged at the end of the day. The first 2 lines of all messages sent appear in the daily system log, accessible to the Library System computer operator.

To print message, enter PRI in command field and Send.

To Send message, press F9, or
enter MSG as command and Send.

Screen displays following: MESSAGE: NO MESSAGE
Type SND at cursor and press Send.
Screen displays following: TERM [] MESSAGE
--A faster procedure is to enter MSG as command and SND as subcommand and Send.
Screen displays: TERM [] MESSAGE

Cursor is in TERM field. Type a three-digit terminal number to show destination, or type ALL if message is for every terminal in network.

Cursor jumps to the line following MESSAGE. Type message until you reach the period in lower right corner of screen.

Press Send to send message. Computer responds MESSAGE SENT.
If more than 10 messages are waiting, screen says that queue is full.

If your message is longer than space provided on screen, repeat this procedure and continue typing message on new screen.

To abort message, press F2 at any time. You may also type XXX and Send except when you are typing message text; if you do this, message will be "XXX."

If you see *STOP* and acknowledge message with Y blinking, press Send. System leaves current message and moves on.

System Functions, cont.

D. Access Levels

Staff members will have various levels of access to functions depending on their job requirements as described in individual departments.

There are four access levels: 0, 1, 2, 3. No permission is needed to enter level 0, which is the public query or display only mode. All staff functions are at levels 1, 2, or 3 and require wanding of a badge to enter appropriate levels.

Wanding a badge is the equivalent of using a special password to show that you are entitled to perform certain functions. Whenever you go online, you are automatically in public query or level 0. Each time you change functions you return to level 0 and must use a badge again to reach higher level. If you try a function that needs a higher level access, the system will prompt you to wand an appropriate badge.

Moreover, each terminal is configured to perform certain functions. A terminal not programmed to do financial transactions, for example, cannot do them no matter what level access a staff member has.

See Appendix D for a chart of categories of functions limited to designated staff.

To Change Access Level

1. Enter PWD as command and press Send. System prompts for wanding of badge.
2. Enter PWD as command, go to subcommand field, and wand badge.
3. Enter a command in command field, wand badge, and press Send.

Password Error Message

If the badge wanded is not at high enough level for operation you are attempting, screen will display at lower right:

ABORTING. INVALID PASSWORD LEVEL.

Repeat procedure to change access levels; be careful to wand appropriate badge.

If a procedure doesn't work a first, try again!
Put terminal in public query & dim screen when you leave.

IV . Patron Query (F7 or PAT) (for Information About Patrons)

A. Entering Patron Query

To enter Patron Query, press F7 or type PAT and Send. The following screen appears:

```
4 Online Circulation System 84-12-16 Display full/all AccessLv 3
Function: Patron Query/Update  Time: 14:45  Press 'HLP' for help

Command: FND Subcommand:  SearchType: BrowseKey: Direction: Amt:
Search String:
              Enter Search String and Search Type, or
              Press HLP for help,  or
              Press XXX to go back to main menu
```

B. Finding a Record

System defaults, or automatically chooses the find command (FND) until you choose another command. Use tabs to move along the line and choose search type (N for name, I for ID number, B for barcode number).

If you choose N, type name in search string, last name first, comma, first name. Press Send.

If you choose B, type significant digits of barcode number in search string. Omit first 5 digits and the initial zeroes.
E.g., for number 2 9080 000850889, type in 850889. Press Send.
*** (check procedure for typing barcode digits)
If you choose I, type ID number in search string.

Alternatively, if you have patron badge available, wand it with cursor in command field. Press Send.

If computer has an exact match to your search string, it will display that patron record.
Depending on your access level, system provides partial or full display
The following appears in partial display:

```
1 Online Circulation System 84-12-16 Display full/all AccessLv 2
Function:  Patron Query/Update     Enter or Press 'HLP' for Help

Command:DSP  Subcommand: Search Type: Browse Key: Direction: Amt:
Search String: Beaver, M.

Name:  Beaver, Marie                              IDNO: 0 000 000 000
Status:  OL Normal                              BADGE: 29999 000 000 000
Privilege: UGRAD  Statistical: Yr1  Department: 8   Agency: Dewey
```

Patron Query, cont.

The following appears in full display.

```
1 Online Circulation System 84-12-16 Display full/all AccessLv 3
Function:  Patron Query/Update     Enter or Press 'HLP' for Help

Command:DSP  Subcommand: Search Type: Browse Key: Direction: Amt:
Search String: Beaver, M.

Name:    Beaver, Marie                              IDNO: 0 000 000 000
Status:    OL Normal                              BADGE: 29999 000 000 000
Privilege:  UGRAD  Statistical: Yr1  Department: 8  Agency: Dewey

Address 1:  Local Address
            2nd line of address              ZIP CODE: 00000 0000
Address 2:  Home (or alternate) address
            2nd line of alternate address    ZIP CODE: 00000 0000

Mail Code: 1    Phone: (000)000-0000  Bus: (000)000-0000  EXT:

Registration Date: 84-12-16        Expiry Date: 85-06-30
                                   Last Use date:  84-12-17

Note:


UNUSED                        UNUSED                        UNUSED
UNUSED                        UNUSED                        UNUSED
```

Type PAR as command and Send for partial display or FUL as command and Send for full display.

Patron Query, cont.

If computer has no exact match to your search string, a list of choices numbered 0-7 appears. A caret next to the last number means that more choices are available in the index.:

```
S Online Circulation System 04-12-16 Display Full/all AccessLv 3
Function: Patron Query/Update      Press'HLP' for help

Command: FND  Subcommand:   Search Type: N  Browse Key: N
              Direction +  AMT: 01
Search String:  Beaver, Marie
    Next 7:
                0  Beaver, Mary
                1  Catt, Harry
                2  Dog, Gary
                3  Eagle, Larry
                4  Fox, Barry
                5  Goose, Cary
                6  Horse, Perry
                7  Ibis, Terry

Enter choice for FND: [] (cursor is here)
       Enter S to get new search key
       Enter C to go back to command level
       Enter H for help
```

System defaults to F at cursor assuming you wish to browse forward in file. Press Send to go forward or press B and Send for backward to browse through names to find correct one. When you reach record you want, type its number and press Send.

You must choose from what's offered on the screen or use F or B to browse.

C. Adding Patrons/Updating Patrons/Issuing Barcodes

IMPORTANT: ADD enters completely new names in the system.
UPD changes data on a person already in system.
NEW assigns barcode to person in the system who never had one or needs a new one.

Adding Patrons to System (F12 or ADD)

Add is used to enter a completely new name into the system. Before resorting to Add, be sure to perform thorough search for the patron record.

Press F12 or type Add as command and Send; system asks for password. Wand appropriate staff barcode.

Patron Query, cont.

Screen highlights fields in which to enter information. After you enter it, system asks if it is correct. Y blinks. Press Send for yes or go back and make corrections.

System prompts for wanding of patron barcode. Wand as prompted. If you wish to enter a record but have no barcode, finish entering data and then press F2. System will accept record with warning that it is incomplete.

Press Send and "Welcome to ___ Library" appears on screen. Press Send again to dim screen to show exactly what computer has stored as the record.

Note: If you wish to change functions in the middle of the ADD procedure, you must press F2 first; then press new function key.

D. Updating Patrons (F13 or UPD)

Update is used to change data on a person already in system.

Press F13 or type UPD and Send; wand appropriate staff barcode. Screen highlights categories to update.

After you update, system asks if information is correct. Y blinks. Press Send for yes or go back and make corrections. "Update completed" message appears.

Press send again to dim screen to see exactly what computer has stored as the record.

Be sure to reach exactly the patron you wish; many similar names occur even within the same department.

Note: If you wish to change functions in the middle of UPD procedure, you must press F2 first; then press new function key.

E. Browsing (F16 or BRW)

If the record on the screen is not the one you are looking for, you can browse through records. Press F16 or type BRW as command and enter desired search type. Use + in direction field to go forward; - for backward.

AMT field shows the number "skipped" between browses. If the number is 01, you see each record; if the number is 10, you see every 10th record.

Press Send. Once in browse mode, continue to press Send to display further records.

Patron Query, cont.

F. Issuing Barcodes (NEW)

New is used to assign barcodes to patrons who are already in system. Before using New, be sure to check barcode field of the patron record.

Barcodes may be issued to patrons who never had one or who need a replacement. Barcodes for people begin with a 2 followed by the four-digit agency code (9080 for MIT). (Barcodes for library materials begin with a 3.)

To issue a new barcode or erase a previously used one, call up patron record. Type NEW and Send. Data is highlighted to give you chance to doublecheck accuracy. Correct if necessary and press Send. After pressing Send you will see blinking Y. If correct, press Send.

Wand the barcode as prompted. Barcode number shows at the bottom of the screen with an agency assigned, e.g., Barker, and the registration date. Press Send and barcode appears in the record. Press Send again to dim screen.

The last barcode digit is a check digit by which the computer checks whether a number is entered correctly. If not, screen gives error message.

Barcodes are not re-useable. Never perform the NEW function without first looking in the barcode field to see if one is there already.

Note: If you wish to change functions in the middle of a procedure here, press F2 first; then press new function key.

REMEMBER: ADD enters completely new names in the system.
UPD changes data on a person already in system.
NEW assigns barcode to person in the system who never had one or needs a new one.

Fines and books are linked to persons, not to their barcodes, so if a person loses ID and gets a new barcode, the records of transactions still remain.

G. Typing in Patron Information

The three indexes to patron information are name, ID number, and barcode number. If a patron telephones, you may type in the last 8 digits of the barcode without having to wand the actual card. You may also type a name, but barcode number is more specific; with names you may have to browse through several to make sure you have the right patron.

Patron Query, cont.

H. Finding Which Books a Patron Has (F10 or CPY)
Call up a patron record.
Press F10 or type CPY as command and Send.
Reference number, shelf & library location, item barcode, material type, and status appear.

I. Finding If Item is Charged to Patron Currently (CUR)
Call up a patron record.
Type CUR in command field and Send to find if patron has items charged out.

J. Finding If Patron Has Overdues (OVD)
Call up a patron record.
Type OVD in command field and Send to find if patron has overdues.

K. Stops (STP ADM, STP MIS, STP ADR, STP STL, STP RPL)
Stops prevent a patron from borrowing. Stops are shown in patron status field. The system automatically stops a patron if fines or bills for replacement or number of books charged out exceed maximum or patron is not registered.

Staff may set Administrative Stops (ADM) to revoke badges; Administrative Stops may be overridden only by authorized staff. Staff may also set Missing Stops (MIS) to show that a badge is reported missing and Address Stops (ADR) to show that address information is incomplete.

Two other stops cannot be removed; they follow the patron card rather than the patron and sever the link between the barcode number and the patron. They are used when a patron ID is stolen (STL) or damaged and needs replacement (RPL).

After entering a stop, if you enter the CHG function, a message appears reporting the stop.

Type commands as command and subcommand and Send:
STP ADM STP MIS STP ADR STP STL STP RPL

L. Reversing Stops (REV ADM, REV MIS, REV ADR)
To reverse a stop, type as command and subcommand and Send:
REV ADM REV MIS REV ADR

Patron Query, cont.

M. Patron Validation (VLD)
Call up a patron record.
Type VLD as command and Send.
Screen shows whether patron validation is accepted, that is, whether there are any stops on the patron.

N. Notes
The status field in patron data shows whether a note is present. Only 2 lines of note show in the full display but the whole note may be displayed by typing NOT and Send. To update, type NOT as command, UPD as subcommand and Send. Type DSP and Send.

The record returns and a caret shows at the end of the note to show that there is more to the message (up to 1,024 characters).

To erase the note, press Clear Field and Send. "Operation completed" message appears.

If a procedure doesn't work at first, try again!
Put terminal in public query & dim screen when you leave.

VIII. Glossary

(Words in upper case letters are defined in the glossary.)

ACCESS LEVEL: The degree to which various categories of staff can change RECORDS or manipulate the system. Levels are entered by WANDING the appropriate staff BADGE.

AGENCY: A participating library unit; a collection of TERMINAL GROUPS that share the same rules for fines and loan periods, according to library policy.

BADGE: An ID card with a BARCODE affixed.

BARCODE: A 14-digit number put on a label in machine-readable form, affixed to ID cards or library items. Barcodes beginning with a 2 are patron barcodes; those beginning with a 3 are item barcodes. Examples:

Patron barcode	2	9999	00003232	6
	I am a person	Agency issuing barcode	Different no. for each patron	Check digit
Item barcode	3	9999	00001212	7
	I am a book	Agency that owns item	Different no. for each item	Check digit

CHARACTER: A single letter, number, or symbol.

CHECK DIGIT: The last digit of a BARCODE, used by the computer to verify the number each time it is used.

COMMAND: A 3-letter abbreviation used to tell the computer which task to perform (e.g., FND, UPD, meaning find, update).

COMMAND FIELD: The position where a COMMAND is entered on the screen.

COPY DETAIL: Information relating to a specific ITEM displayed on the screen (e.g., material type, location, copy number, barcode).

CURSOR: A flashing light that indicates the position on the screen where a CHARACTER will appear when entered.

DATABASE: Electronically stored information that can be retrieved by a computer.

DEFAULT: Certain CHARACTERS or COMMANDS supplied by the computer at times to save the operator the trouble of typing them in. These CHARACTERS are usually the most frequently used entries and can be changed by typing over them.

DEPARTMENT: In Patron Query, indicates course or laboratory affiliation of a patron.

DISPLAY: Information that appears on the screen. Staff may see a Partial Display by entering PAR in the display FIELD, or a Full Display by entering FUL.

FIELD: An area of the screen that shows particular information, e.g., author, title, call number. Some fields are protected (blocks of CHARACTERS that appear on the screen that you cannot change by typing over them), while other fields are unprotected (blank areas or blocks of CHARACTERS that can be changed by typing over them). Unprotected fields appear in bright type.

FUNCTION: A group of series of tasks; a mode, e.g., Bibliographic Query, Patron Query.

ITEM: A single copy of a book or other library material, as opposed to a title. Example: Huckleberry Finn is a title; the AGENCY might own 3 copies, each of which is an item.

LIGHT PEN: Pen-like device used to read BARCODES into the computer; also called a WAND.

LOCATION: See AGENCY.

MAIL CODE: In Patron Query, the address to which the patron wishes notices and message sent (local or home).

MENU: List of options available displayed on the screen to be performed at user's discretion.

PASSWORD: A series of CHARACTERS used to enter an ACCESS LEVEL; at MIT, one must WAND an appropriate staff BADGE.

PRINTER: A device that prints information on the screen at the request of the user.

PRIVILEGE: In Patron Query, indicates class of patron, e.g., GRAD, UGRAD, FAC, STAFF.

RECORD: A group of FIELDS that describes an ITEM or patron. In bibliographic FUNCTIONS, the record is made up of author, title, and call number FIELDS, for example.

SEARCH STRING: A series of CHARACTERS typed by the user which are read and located in that order by the computer.

SEARCH TYPE: A category by which to look for information on a patron (e.g., N=name, I=ID number) or on an ITEM (e.g., A=author, T=title).

SEND: The red key that, when pressed, tells the computer to process instructions.

STATISTICAL: In Patron Query, indicates patron's year (e.g., YR1, YR2, PhD) or other institutional affiliation (e.g., MIT affiliate, Tufts).

STATUS: Indicates whether information was registered online or from previously loaded tapes.

SUBCOMMAND: A 3-letter abbreviation that refines and narrows a COMMAND.

SYSTEM: The computer and all its components--central processing units, terminals, programs.

TERMINAL GROUP: A service point in the AGENCY: Within the Terminal Group are individual terminals. Each Terminal Group corresponds to a location. The Geac system uses Terminal Group to determine whether an ITEM has come "home." For example, if a book is charged out from Terminal 6 at Barker and it is discharged from Terminal 14 in Aero, the system will tell user where it belongs.

WAND: Read a BARCODE by passing LIGHT PEN or WAND over it.

PURRS

Princeton University Reference Retrieval Service

A service which provides on-line literature searches for Princeton University Library users.

When one of the following situations occurs - THINK PURRS!

Whenever the user must:

- retrieve every article on a subject
- search indexes not available in hard copy in the library
- verify a bibliographic citation quickly
- conduct a search involving several interlocking concepts or data bases
- locate articles in foreign languages
- search for very recently published articles
- search for new terms
- get started on a project
- find a few key authors or articles
- make sure no work or research has been done on a topic

This session is to acquaint you with the reference and research service known as PURRS. PURRS stands for Princeton University Reference Retrieval Service.

The main part of the presentation is a videotape produced by Van Pelt Library at the University of Pennsylvania. The videotape illustrates an actual literature search conducted a few years ago by Jim Cogswell, our present head of circulation while he was at the University of Pennsylvania.

Before you see the tape, lets explore what we mean by literature searching. How many of you are familiar with the Reader's Guide to Periodical Literature? You will remember that in the Readers Guide you search for magazine articles by using index terms as well as by author. For example, if you are looking for articles on genes, you will find them under the terms genes, chromosomes, genetics, and mutation.

The subject cards in the public catalogue operate on the same principle. They describe the library's holdings by subject.

There are many printed indexes which like the Readers Guide can be accessed by index terms. Among the major ones are the Social Science and Humanities Indexes, the Public Affairs Information Service Index, the New York Times Index, and Dissertation Abstracts, which are all found in the Reference Division.

In the 1960's the publishers of many of these guides to the literature began to print their indexes using computers. The title of the article, author(s), journal title, issue, page numbers, and the indexing terms were stored in a computer. As a result the information in magazine and journal articles, monographs, dissertations maps and music scores became available for searching through the use of the computer. For example, a medical question could be mailed to the National Library of Medicine in Washington which prints Index Medicus. The people in Washington would key punch cards to match the words of the question with the index terms stored in the computer. The result of this match would be a list of articles that answered the question, which would then be mailed to the requester.

We can now do the same kind of searching "online" using a computer terminal linked directly to a computer in New York or Washington via a telephone line. The answer to the patron's question appears immediately in the form of a list of citations printed at the terminal.

The terminal can be one of two kinds.-- either a printing terminal which looks and works like a typewriter; or a CRT (cathode ray tube) or video terminal with a slave printer attached. An example of this type are the RLIN terminals in Technical Services Division. Currently there are terminals in Firestone and in departmental libraries such as Engineering, Biology, Geology, Chemistry, Psychology, Woodrow Wilson, and Plasma Physics.

When searching manually in a printed index, an interaction occurs between the searcher and the index. The searcher has a question -- the index has the answer. When searching online the same kind of interaction occurs between the searcher and the information file in the computer. The information file is more commonly known as a database. There are databases available for almost every subject with the clear majority available for topics in the science and business fields.

The searcher asks the computer the question using a predetermined vocabulary of commands understandable by the computer, and the computer responds quickly. During the search, some aspects of the question may need to be changed and the question can then be rephrased. The "dialog" or process of questioning and answering continues until the patron's question is satisfactorily answered and he/she has a list of citations about the topic.

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The overall process is similar to manually consulting a printed index or several indexes for articles on a subject. For example, the searcher, using the printed index, uses the key words sugar or sweeteners to find articles on the subject. By looking at the full title of the article or the author's name or the abstract, the searcher can usually, but not always, determine if the article is relevant and useful.

Searching for article manually can be very time-consuming and inaccurate. The title of an article can be very vague or misleading. For example, the title, "The Management of Marine Fisheries" doesn't tell you that the article is about codfish culture in the Atlantic. The searcher may need to consult many sources looking for the right article especially if he needs to find an article that combines more than one subject or idea such as Codfish and Atlantic/

(Turn on machine)

An online literature search using the computer, as illustrated in the videotape, overcomes some of these major problems. ~~Searchers~~ Articles are indexed not only by subject but also by important words or key works in the title and abstract. Searchers can pin-point the subject of an article by matching the words of the question and the words stored in the database. They can join several concepts in one search. They also can search many databases for the same information and can do this all very quickly. It is also possible to locate and retrieve almost every article written on a subject or by an author during a particular time span or in a specific language. It is also possible to search indexes that are not available in hard copy in the library.

Lets take a look at the videotape. I will be glad to answer any questions afterwards.

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SHOW VIDEOTAPE.

Conclusion:

The videotape illustrates a fairly complex search of science literature. The user only wanted articles which dealt with all three concepts -- sugar or sweeteners, artificially produced, and used as food additives.

A search like this one containing several ideas, would take a very long time if conducted manually.

This is not the only time PURRS is used, however.

- It is used to retrieve quickly many articles on a given subject.
- It is used to search indexes that are not available in hard copy in the library.
- It is used to verify bibliographic citations quickly when the user is uncertain about any element in the citation. i.e. the author, the exact title, place of publication , or the date.

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- It is useful for searching a few articles to start a student on a topic that would be difficult to search manually.

- It is used to locate articles written in foreign languages which may be easier for bi-lingual readers; in the videotape the user was only interested in English language articles, some users on the other hand may prefer articles in French or some other language.

- It is possible to search for very timely topics or terms that wouldn't appear in a printed index for months. This is especially true in the sciences where a new term is used in the database as soon as it appears in an article.

- It is possible to do an exhaustive search to be sure that no research has been done on a topic in the case of thesis research.

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As part of the conclusion there are a few general comments which need to be made about the videotape, and about our service, PURRS.

SEARCHING TIME. Not all online searches take as long as the example on the tape. Some simple searches can be done in a few minutes, and very complex searches can take even longer than 20 minutes. The "average" search requires between 5-15 minutes. It is also important to mention that not all searches are successful. Sometimes the answer is not found/

COSTS. The costs which are quoted on the videotape are no longer accurate. The costs for a search are determined by two things, the length of time spent online, and the number of citations which are requested by the user. The average cost is somewhere between $5.00 and $20.00.

TIMEFRAME OF DATABASES. Almost all of the computer stored data bases started in 1969 or thereabouts. If the user needs earlier material there are two general databases that can be used (SciSearch and SocialSciSearch), but otherwise the search will have to be done manually.

How can you help to determine whether to suggest online searching to a patron?

-Has the patron searched the card catalogue, and perhaps a printed index and still cannot find information?

-Does the patron have a complex question and can't determine which index to use or will have to spend a great deal of time searching many indexes or has too many concepts to be coordinated manually?

-Does the patron have a new term in the field which doesn't appear in the printed indexes yet or needs current information.

It is obvious form a presentation of this sort that we aren't training all the staff to be searchers, or even to know exactly when a PURRS search is appropriate.

Instead we are recommending that the staff continue to refer reference questions to librarians, who will determine if a PURRS search is appropriate and which searcher will be consulted, or which database will be used.

The STAFF HOWEVER, CAN PROMOTE THE USE OF PURRS BY DESCRIBING THIS SERVICE TO USERS AND BY URGING THEM TO DISCUSS ITS POSSIBILITIES WITH THE LIBRARIAN.

Thank you.

PARTICIPANT EVALUATION PURRS PRESENTATION

Please answer the following questions. Your comments are essential to evaluate this presentation. When you are finished, send it to Maria Larson, Library Personnel Office.

Name: (Optional) Date:_____

Check one that applies: Librarian_____ Supporting Staff:_____

1. Does the PURRS presentation go into:

_____Too much detail
_____Enough detail
_____Insufficient detail

2. How useful is the presentation in explaining PURRS?

_____Very useful
_____Useful
_____Not useful

3. How interesting is the PURRS presentation?

_____Very interesting
_____Interesting
_____Not interesting

4. Is the PURRS presentation:

a)_____Too long,	_____Too short,	_____or about right?
b)_____Too fast,	_____Too slow,	_____or about right?
c)_____Too elementary,	_____Too advanced,	_____or about right?

5. Would you recommend that this presentation be repeated for new employees?

6. Do you like the videotape format of the presentation? YES NO
   If not what don't you like about it?

7. In what ways is the PURRS presentation valuable to you?

8. What suggestions can you make for improving or extending the PURRS presentation?

9. What other information about PURRS would you like to have at this time?

Thank you very much for taking time to fill this out.

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